

# Apparel Online

BANGLADESH

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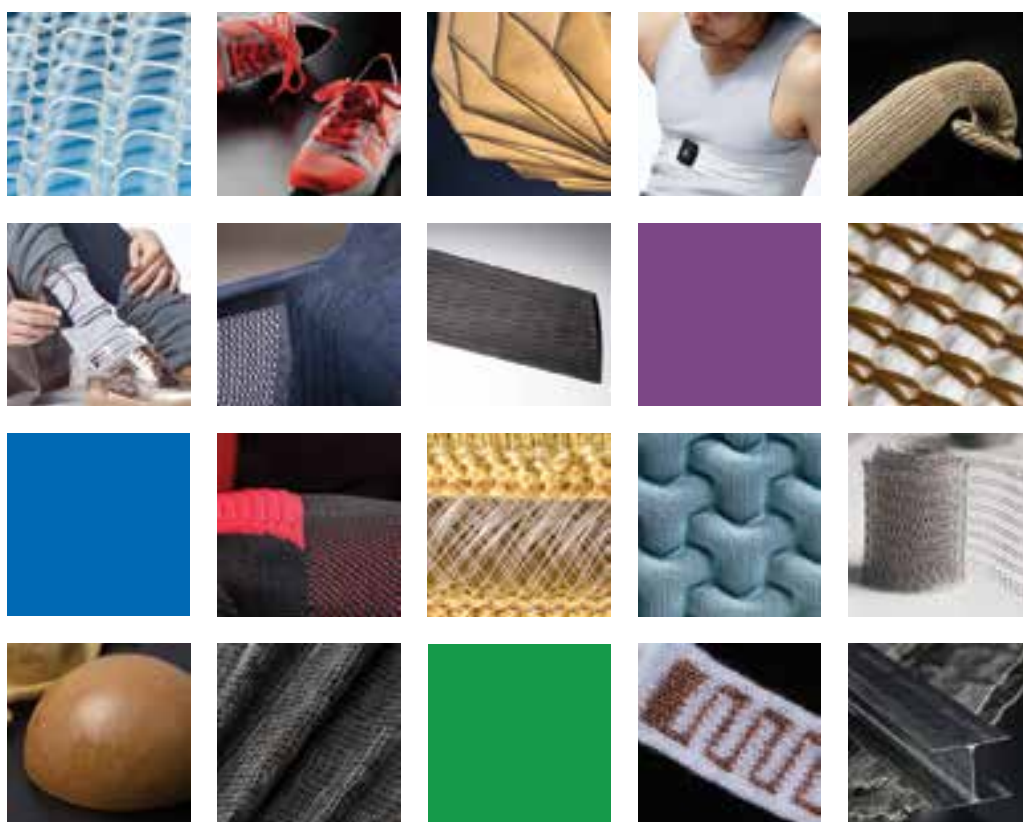
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## Cover Story

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## FROM THE EDITOR-IN-CHIEF'S DESK...

**As new BGMEA leadership and political stability pave the way, 2019 could turn out to be a memorable year for the industry**

Recently I came across a report released by the Export Promotion Bureau (EPB), which distinctly highlighted an impressive growth of 12.5 per cent in Bangladesh's garment exports for the July-April FY 2019 period.

It wasn't surprising. But what pleased me was to know from the industry that improved working conditions in most of the garment factories of the country was the major factor that enhanced the growth of this sector.

Also, one mustn't forget that the political stability in the country after the successful conduct of the recent elections has also improved the image of the country on the world map, which in a big way, is helping the industry grow. There cannot be a better time than now to be in Bangladesh.

I know the increase in wages as well as the cost of production is a big challenge that the apparel industry has been facing for quite some time now and unless something is done about these issues, things would get harder and tougher for Bangladesh apparel industry in the years to come.

But I have always been optimistic when it concerns Bangladesh and, my optimism got a high when Dr. Rubana Huq assured immediately after being elected as the first female President of Bangladesh Garment Manufacturers and Exporters Association (BGMEA), that she is keen to rebuild the image of Bangladesh's RMG sector. Dr. Huq is very clear in rationalising the wages as well as in initiating efforts to promote skill development in the industry.

I see many Bangladesh brand building initiatives being undertaken in LinkedIn, which are bound to hold the industry in good stead as far as the sector's image is concerned, and more so at a time when global dynamics is undergoing a drastic change.

When the US President had first announced to impose 25 per cent duty on products imported from China, garments were not supposed to be a part of it. However, now Donald Trump has made it clear that the duty is applicable for garment products as well.

The day this comes into effect, which could be anytime soon, Bangladesh could just become the darling nation for many global retailers. Already, the first two months of 2019 saw the country's apparel exports to US reach US \$ 1.08 billion, which is a good jump of over 10 per cent year-on-year.

The numbers will go up fast, once 25 per cent duty is imposed by US on Chinese products. So, it all seems to be going in the right direction for the industry and the country as a whole.

The world is looking at Bangladesh again and this time everything is working in its favour... I won't be surprised if Bangladesh manages to beat its export projection much before the year ends. 2019 could well be the defining year for the country's apparel sector.

*Finally, on the occasion of Eid, I would like to wish all our readers lots of happiness, prosperity, success and peace for the year ahead.*



## EDITORIAL TEAM

<b>EDITOR-IN-CHIEF</b>	Deepak Mohindra
<b>EDITOR</b>	Ila Saxena
<b>DEPUTY EDITOR</b>	Deepankar Shyam
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<b>CREATIVE TEAM</b>	Raj Kumar Chahal Peeush Jauhari Satyapal Bisht
<b>PHOTOGRAPHER</b>	Vishal Chaudhary
<b>OPERATION DIRECTOR</b>	Mayank Mohindra
<b>PUBLISHER &amp; MANAGING DIRECTOR</b>	Renu Mohindra +919810058986, 01964874405 rmohindra@apparelresources.com

### COUNTRY OFFICE

Apparel Resources Private Limited  
Apartment B-2, House No. 26, Road 18, Block A,  
Banani, Dhaka - 1213, Bangladesh  
Phone: +880 255035623

### HEAD OFFICE

Apparel Resources Private Limited  
B-32, South Extension-1, New Delhi-110 049 (India)  
Phone: 91-11-47390000,  
E-mail: editor@apparelresources.com  
Web associate: www.apparelresources.com

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The new BGMEA team has taken over responsibilities under the leadership of Dr. Rubana Huq recently. Considering the various challenges the industry is facing, it would not be wrong to term the current phase as a critical one, smart handling of which in many ways would determine the industry's future in the coming days. Keeping the same in perspective, what should be the focus areas of BGMEA going forward, to ensure that the industry continues on its growth path? Please share your views...

#### TAREK AZIZ

*Post Graduate in Textile, Bangladesh University of Textiles*

Actually, we are very emotional people... We do not have enough expertise to take up leadership roles in RMG. Therefore, at first, we need to create dynamic leaders for our growing industry. In this regard, we need strong help and support from the BGMEA along with factory owners. They should start believing in our local experts. With the industry undergoing its glorious time at present, this is the right time to take up the aforementioned initiative proactively for the future sustainable RMG industry.

#### SUDATH MAHANAMA

*Head of Operations, Star Garments Ltd., in-corp with Ventura NY*

Congratulations! As a pioneer in Bangladesh's apparel industry, I am very happy to see the achievements that the garments industry in the country have had since 1984-85. Now it is the time that someone like Dr. Huq concentrates on the next ladder of having more high-end manufacturing! Climb another ladder on the pyramid towards the niche!

#### HARUNUR RASHID

*Senior Garment Technologist*

Dr. Rubana Huq is a respected woman and she has the requisite knowledge because of which I am sure she will re-organise the RMG sector accordingly.

We do not want to see any foreigners in the RMG industry, and this is our prime expectation from her after becoming the President of BGMEA.

#### MD. NAZMUS SAKIB

*IE Executive, Progress Apparels (BD) Ltd.*

I am expecting our BGMEA's President to kindly utilise our new generation's knowledge and have faith in Bangladesh's talent and textile owners. I am saying this after seeing a majority of owners depending on foreign management these days.

#### ASHIQUR RAHMAN SAKIB

*Merchandising Assistant at Ama Syntex*

According to me, sustainability of our RMG sector is one of the major concerns. Another aspect is to have proper incentivising plans for new start-ups. These two areas should be effectively addressed by the new BGMEA team for the betterment of the garments industry.



## FAKHRUDDIN ALI AHMED (JAMAL)

*Sr. Manager – Business Development,  
Anowara Group*

As per our assessment, if the following steps are taken, then hopefully Bangladesh garments export would increase manifold:

Formulation of special export monetary policy to protect exporters from the strong position of Taka against US dollar; withdrawal of source tax from the exports of readymade garments for two years and provision of 2 per cent special incentives to protect the industry; withdrawal of VAT on all local products and services; provision for power and gas connections on priority basis in the RMG sector, apart from keeping the energy prices stable until connection and supplies of power and gas become normal; removal of existing obstacles at Chittagong Port, Dhaka Airport and Benapole Land Port by taking measures to raise capacity standards of the ports; adoption of necessary measures to relocate small and medium factories by establishing ICD and Special Economic Zones in areas adjacent to the capital city; cancellation of the provision of Bangladesh Bank, which prevents a group company from getting all kinds of banking facilities when one of the group's units becomes defaulter; extension of deferred payment time limit of Bangladesh Bank from one year to five years in case of importing capital machinery; digitalisation of the bond system for auto-renewal of customs bonds and ensuring the transparency of bonds; adoption of special refinancing schemes to provide loans from the foreign currency reserve of Bangladesh Bank with lower interest rate for modernisation and automation of factories; adoption of special initiatives in Government and private sectors to diversify the market, especially in Russia and CIS countries for access of products and export expansion; branding the unprecedented success of Bangladesh's RMG industry in ensuring safe working environment after the Rana Plaza incident and the silent revolution for green industrialisation; ensuring stability of all Government policies, including the revenue policy; and last but not the least, adopting special strategy and effective measures to manufacture value-added products with design and innovation.

## SHIBHU SREEDHARAN

*CMO – Principal Sales &  
Manufacturing,  
Coimbatore, Tamil Nadu,  
India*

First of all congratulations to Dr. Rubana Huq; take the association forward with a plethora of visionary achievements soon!

## IMRAN CHOUDHURY

*Bangladesh*

The BGMEA should work rigorously towards sustaining factories from cut-throat price competition and fixing a standard bottom line price for all the items.

## KEERTHI ABE

*International Consultant in  
Transparent Labour Costing for  
Sustainability at Debenhams*

Best wishes first! I expect Dr. Rubana Huq to bring the workers and their supervisory-management teams closer, to become more trusting of each other as a step towards a harmonious and efficient work environment.

To achieve the above, there are many possible strategies amongst which I propose BGMEA to find out the percentage of sewing machine operators who have received a 'written/pictorial work instruction' at the start of a newly assigned job/style. Availability of such 'written/pictorial work instruction' would bring the focus upon something tangible, rather than depending on less reliable verbal instructions.

## S HABIB KHAN

*CEO & Founding Partner,  
OTAL BD*

BGMEA should focus more on compliance and technological expansion in the garments industry; besides, it should collaborate and provide Government facilities in this sector, especially for garment workers.

## POST YOUR COMMENTS



After months of waiting, the Supreme Court has finally given its verdict allowing Bangladesh Accord on Fire and Building Safety to continue operations in the country for one more year.

If Alliance could finish its work within the stipulated time period and leave the country, is it reasonable to give Accord a year's extension? What could be the probable reasons behind this move?

Please share your views on the same...



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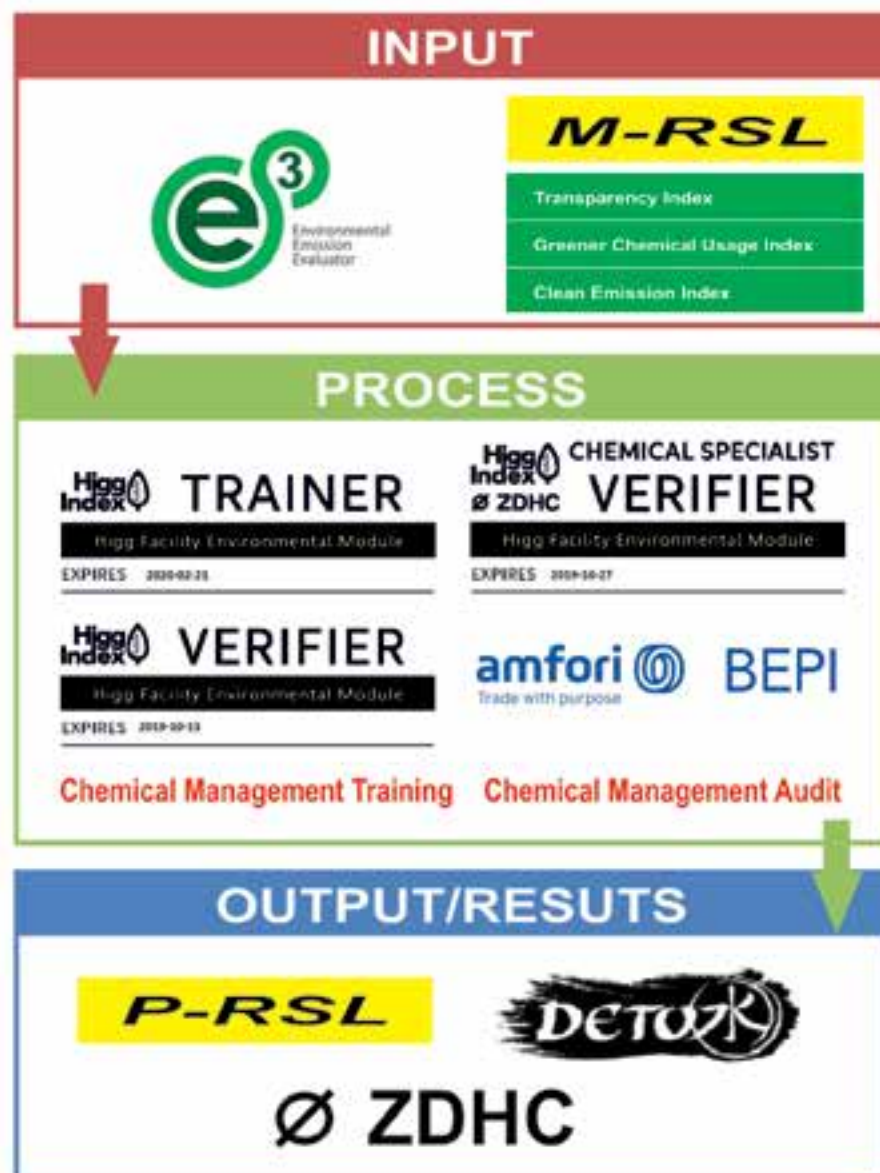
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# Women ENTREPRENEURSHIP in RMG industry...

The teeming multitude of women clad in bright *saris* making their way to garment manufacturing units in the industrial hubs of Savar, Ashulia and the likes every morning is a sight to behold, especially for those advocating women empowerment and independence.

As per a World Bank report released recently, Bangladesh is among the few countries in South Asia that has increased female employment in the last decade while also cutting the wage gap between men and women significantly. Titled *Voices to Choices: Bangladesh's Journey in Women's Economic Empowerment*, the report underlines that the female labour force participation rate increased to 36 per cent, from 26 per cent between 2003 and 2016.

The apparel sector in particular could take pride for playing a big role in fuelling this progress; after all, out of the total workforce in the garment manufacturing sector, 80 per cent is occupied by women!

But what about women entrepreneurship in the country?

As per this report, although the rate of female entrepreneurship has been growing, women-led businesses continue to be small and concentrated in specific sectors; only 1.7 per cent of enterprises in the formal sector are owned by women, which is among the lowest rates of women's enterprise ownership in the world.

However as per another report, *Mastercard Index of Women Entrepreneurs* (2018), Bangladeshi women are ahead of United Kingdom, Japan and India in terms of business ownership as one-fourth of the businesses in the country are led by women. The country ranked 18th in the benchmark of 'Business Ownership' among 57 economies across Asia-Pacific, Middle East and Africa, North America, Latin America and Europe. Though experts are sceptical about the ground realities as far as women entrepreneurship is concerned, more so in the readymade garment sector of the country, considered as the backbone of Bangladesh's economy.

In a country led by a woman Prime Minister and the RMG sector which recently got its first-ever woman President in Dr. Rubana Huq, women in general reportedly still own and manage significantly fewer businesses than men. According to the Economic Census 2013, the number of female-headed establishments was 0.56 million (7.21 per cent), while it was 0.10 million (2.80 per cent) in 2001 and 2003.

Historically, fewer number of women entrepreneurs than men can be attributed to the fact that fewer women than men start businesses to begin with. Evidence suggests that a variety of reasons contribute to explaining the observed differences in entrepreneurial behaviour across gender, and that such differences have significant implications at the macroeconomic level.

It goes without saying that women entrepreneurship still remains a big challenge, thanks to numerous reasons – lack of capital support, rigid social customs, etc.

As per a survey carried out by the World Bank, women business owners in Bangladesh reportedly continue to face societal barriers, hindering them from growing their businesses. Among those women business owners who responded to the World Bank Group survey, 28 per cent felt that women business owners faced obstacles that men do not. During interviews, many women business owners reportedly said that societal and family pressures were the greatest barriers towards starting and growing businesses.

In this issue of *Apparel Online Bangladesh (AOB)*, we caught up with two women entrepreneurs, who are successful in their own rights. Here are the excerpts from their interviews that underline their entrepreneurial journey and their individual contributions to the respective businesses to take those forward.

But before you proceed, note that as per some global research, women are more likely to take a long-term view of their businesses, reinvest their business profits into their firms and carefully manage risks to scale sustainably...

# ‘DOING BUSINESS AS A WOMAN CAN BE CHALLENGING IN BANGLADESH’

Deputy Managing Director  
of East West Industrial Park  
Ltd. speaks to *Apparel Online  
Bangladesh* in an exclusive  
interaction.



Rumana Rashid, Deputy Managing Director – East West Industrial Park

Started by Harun-Ar-Rashid in 1979, East West Industrial Park Ltd. is a renowned suit manufacturer from Bangladesh catering to diverse clientele from across the globe including India, Japan and Europe.

We caught up with the Deputy Managing Director of the company Rumana Rashid (daughter of Harun-Ar-Rashid) to get her perspectives on business, challenges and the way forward for East West Industrial Park from the viewpoint of a woman entrepreneur.

**AOB: In this male dominated industry, are there any challenges as a woman entrepreneur?**

**Rumana Rashid:** In Bangladesh, it is sometimes difficult to be a woman entrepreneur. In our culture, male and female working together is not always taken positively. If one is going out to work, then family support is a must. If one gets support from the family and can balance things well between home and office, I don't see any reason why one cannot be a successful entrepreneur.

As an entrepreneur myself, when I go out for business meetings with clients, I don't feel any difference being a woman. At global

level, there is no differentiation between men and women. At the end of the day, it is your product which sells, so if you offer your client something good and competitively priced, business is not difficult.

**AOB: Now that you have a woman as BGMEA President, do you see the beginning of a new era?**

**Rumana Rashid:** Being a woman and also an industrialist who has been involved with apparel manufacturing for long, I think Rubana Huq's taking over as the President of BGMEA will inject new energy to the industry.





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*Fit Elegance was established on 26th March 2001 as a BRAND born in Bangladesh to cater to the growing demand for suits, blazers and trousers. Its mission is to create distinct products with best quality and best fit in mind. Their total 10 shops are now in Dhaka and Chittagong.*

She is a very dynamic woman and we all strongly believe in her capabilities.

AOB: Your role in the company...

**Rumana Rashid:** As an entrepreneur, even though one has to look after every aspect of the business, my areas of interest are basically finance, merchandising and marketing. I am looking after India and Japan markets since last 2-3 years, while Europe is being looked after jointly by me and my brother. My father is also actively involved in all areas.

H&M is one of our main clients in Europe; In India, we have been working with Raymond for more than 10 years now. Recently, we have added Madura Garments and Blackberrys in our clientele list from India.

Our principal offerings are men’s suits and trousers. Even though we have units for other products as well, but suit manufacturing remains as the core business both in terms of volume and capacity. Currently we have 14 blazer lines.

AOB: What’s the importance of design and technical expertise in suit making?

**Rumana Rashid:** Suit is a technical product and very difficult to make. To be successful in suit manufacturing, designs and skills are equally important. Just to give you

an example, Raymond has diverse requirements in terms of style and design; besides its order volumes are also small. To accommodate such orders, one needs to have expertise in design and production as well as sufficient flexibility. We have dedicated lines for products and buyers.

As far as design is concerned, in most cases, they come from the buyers. However, these days, buyers prefer us to come up with own design developments. What’s more, most of the buyers deal in full package (from fabrics to garment), which makes our job a little more difficult as we have to figure out feasible sourcing channels. Even though we have our own textile manufacturing unit, but that does not suffice for all the buyers. So we have to source fabrics majorly from China and a little bit from other countries.

AOB: What is your major challenge as a garment manufacturer currently?

**Rumana Rashid:** Bangladesh garment industry as a whole is going through a very critical phase. On one hand, wages and cost of doing business have gone up considerably; buyers on the other hand are not ready to pay anything extra. What’s more, considering the competitive nature of this business globally, we cannot even sometimes ask buyers to pay more. So the only option we are left with is to increase efficiency and cut cost if and where possible.

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» PANTALOOON FASHION LTD.

**Established:** 2009  
**Product Range:** Trousers  
**Per Day Capacity:** 2,500 pieces

» EAST WEST FASHION GARMENTS LTD.

**Established:** 1985  
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Email: manikc111@gmail.com, info@eastmanbd.com



## FACT SHEET

- In 2018, 163 million women started a new business.
- There are around 111 million women who have been running established businesses worldwide.
- Women are 5 per cent more likely to produce innovative ventures, compared to men.
- In 2014, the United States ranked No. 1 in the world with regard to favourable conditions for women entrepreneurs.
- In the United Kingdom, women-led businesses are 86 per cent less likely to be venture-capital funded than men-led businesses.
- Over the past 20 years in the US, 4 in 10 new entrepreneurs have been women.
- According to 2017-18 Global Entrepreneurship Monitor (GEM), the female entrepreneurship rate increased by 6.6 per cent.
- In comparison, the male rate increased by 0.7 per cent. Previously, a 2017 GEM report focusing on women highlighted that female entrepreneurial activity increased by 10 per cent globally from 2014 to 2016.
- According to GEM, the best performing region for female entrepreneurship is Latin America and the Caribbean with an average female Total Entrepreneurial Activity (TEA) rate of 16.7 per cent followed by North America at 12.8 per cent.
- Europe reports the lowest average female involvement in early-stage entrepreneurial activity (6.1 per cent).
- Gender parity is highest in the Latin American and Caribbean region with 8 women entrepreneurs to every 10 men. It is lowest in Europe with 6 females for every 10 male entrepreneurs.
- Gender parity is also low in the African region (0.6) and North America (0.65) - women in those regions are two-third or less as likely to be engaged in TEA as their male counterparts.
- Female entrepreneurship levels decline as economic development level improves. Rates are highest among women in developing economies (13.3 per cent) and lowest in the developed economies (7 per cent).



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Weaving section has 40 set machines from Smit Rapier loom (Italy) & Tsudakoma (Air jet High Speed). The machine capacity per day is 15,000 yards. Dyeing section has 9 set Jet dyeing machines and Jigger dyeing machines. The machine capacity per day is 30,000 yards. Finishing section has 5 sets stenter Decca Dising Machine, Sanforizing Machine, Fabric Inspection Machine and Fabric rolling machine. Products manufactured here include polyester panama, poly viscose, poly viscose elastane etc.

Our various teams are identifying the areas where we can cut cost and increase efficiencies. Even though savings made through such efforts would be very little, we will have to focus on these areas as we have no other alternative.

**AOB: Lately Government is focusing a lot on other export-oriented sectors. Are there any apprehensions about the focus shifting from RMG?**

**Rumana Rashid:** I don't think so! In my opinion, other sectors also need to grow. Considering the contribution of the RMG sector to the economy, employment and development of the country, growth of other industries is no threat for apparel manufacturers. One also needs to

consider that buyers still have a lot of faith in Bangladesh and its capabilities; as such garment manufacturing sector would continue to be at the forefront of our economy and exports.

**AOB: Lately Government is focusing a lot on other export-oriented sectors; are there any apprehensions of focus shifting from RMG?**

**Rumana Rashid:** Keeping the existing scenario in perspective, focus for future is on consolidation rather than on expansion. Going forward, the two areas of consideration will be to provide full packages to our buyers and secondly to work inwardly to improve efficiencies and savings.

## EAST WEST INDUSTRIAL PARK AT A GLANCE

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**Product Range:** Dress Pants, Trousers  
**Per Day Capacity:** Trs 2,200 pieces; BTS 4,000 pieces

### » FASHION SUITS & TROUSERS LTD.

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**Product Range:** Suits & Blazers  
**Per Day Capacity:** 1,000 pieces

### » ALIZA FASHION LTD.

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# SEPAL GROUP

## WORKING ON INCREASING EFFICIENCY

Director of Sepal Group, Tania A Munshi shares her vision for the company in an exclusive interaction, and underlines the challenges faced.



Tania A Munshi, Director, Sepal Group

Sepal Group is one of the leading garment manufacturers in Bangladesh, which started its journey in 1985. Located at Gazipur, about 30 kilometres from the capital city of Dhaka, Sepal Group operates from a self-owned property spread over an area of 3,00,000 square feet.

Run and managed by the husband-wife duo, Sepal Group has three manufacturing units and a washing plant. The team of *Apparel Online Bangladesh* caught up with its dynamic Director Tania A Munshi (also daughter of Commerce Minister Tipu Munshi) to get a first-hand knowledge of how she as a woman entrepreneur is spearheading the business started by her father, and her vision and roadmap for Sepal.





### Sepal Group Verticals

Sepal Washing Ltd.

Glory Fashionwear Ltd.

Orchid Garments Ltd.

Sepal Garments Ltd.

#### **AOB: What is your experience and role in the company?**

**Tania:** We started the company in 1985. However, I am in the business since last 10 years. Both I and my husband are involved in running the day-to-day affairs of the company. Even though I prefer to look after administration, accounts and marketing, while my husband is more into production. But at the end of the day, both of us are effectively involved in every aspect of the business.

#### **AOB: Product portfolio and clientele...**

**Tania:** We moved to the current location in 2013. Before moving here, everybody knew Sepal as a bottoms' manufacturer. So we have been pretty much into manufacturing bottoms and sometimes tops, shirts, etc. In bottoms, we used to make chino pants, denims, twills, and so on. However, after moving to the present location, we started doing multiple products; currently, we do everything in woven including outerwear; even in knits, we do a range of products which are not the usual run-of-the-mill categories.

In the existing scenario, differentiation has become a must to survive and sustain. This is because if everybody starts doing the same stuff, competition will be extremely high. However, the sad part is that many buyers still do not know several factories in Bangladesh that do a range of products including critical products, which hitherto has been China's domain.

One of our main clients is Target from USA. We also work for Zara, Tesco, Walmart. So far, we have been working with the volume buyers only, but now we are open to buyers with smaller volumes as well. If you solely depend on volume buyers, there are times when they don't have enough orders; it is therefore feasible to have a mix of buyers.

#### **AOB: Production volume and flexibility...**

**Tania:** We are not a very big factory; currently, we have 27 lines capable of producing around 7 to 8 lakh pieces of garments (assorted) per month. The most interesting part about our manufacturing unit is that most of our lines are

capable of producing almost every product. Considering that many of our orders are seasonal, we had to build in that flexibility. The flip side is that factories which have specialised lines are more efficient than those like ours but considering the existing current business scenario, line flexibility has become a must for us.

#### **AOB: What are the challenges you are facing subject to wage hike and buyers' changing requirements?**

**Tania:** Yes, the recent wage hike has emerged as a major challenge. As the buyers are not ready to pay anything extra to compensate for this hike, we'll have to keep the price unchanged, and in such a scenario, profit margins will fall even further. Given the extent of competition, we cannot even bargain for better pricing as there are scores of others who would accept that order at break-even.

So the second biggest challenge would be the in-fighting between the manufacturers to grab buyers by decreasing our prices.

At a time when production cost has gone up substantially, prices haven't, while on the other hand, buyers' requirements are increasing everyday so much so that even for repeat orders, they are asking for price reduction. All these factors combined together have made business extremely difficult.

#### **AOB: Keeping in consideration the various challenges, what would be your focus area(s) going forward?**

**Tania:** Our main focus would be towards increasing efficiencies. To do that, we are going for automatic machines if and where possible. But considering the cost-effectiveness of such machines, it is not possible to go all out for automation consequent to which we are trying to mix match manpower and machines in such a way that we can get optimal efficiency. Our IE department is working towards it.

We also have in-house training for the workers to increase their productivity, in which at times, the buyers are also helping.



# ALPINE PRO has a special eye on Bangladesh

***Leader in Czech outdoor clothing, footwear and accessories market, the company has comprehensive sourcing strategy in place; new liaison office gives teeth to operations.***



There was a time when one would come to Bangladesh to source basic garments only. With changing time, the country's image and competencies have undergone a drastic transformation, so much so that brands and retailers today look at fulfilling a major chunk of their all-round sourcing requirement from Bangladesh and not just apparels.

“...I want to make Bangladesh a prime sourcing destination for ALPINE PRO, so that it could account for full range of ALPINE PRO's apparel sourcing requirements. Apart from garments, we also have sizeable business in accessories like socks, hats, caps, belts, etc. My plans are to source accessories from here as well,” declares **Morshadul Amin Shahin, General Manager of ALPINE PRO's** Bangladesh liaison office speaking to *Apparel Online*.

ALPINE PRO is a pioneer when it comes to Czech outdoor clothing, footwear and accessories market. In fact in the Czech Republic, ALPINE PRO is currently the brand with the most widespread network of authorised and franchisee stores in the field of outdoor activities. The company also supplies its products to the largest retail chains such as Sportisimo or Globus. It has subsidiaries in Slovakia, Poland and China. Furthermore, ALPINE PRO brand is represented in more than 20 countries (such as Germany, France, Ukraine, Belarus, Lebanon, etc.) and its products are sold from around 600 sales points globally.

ALPINE PRO opened its liaison office in Bangladesh in 2018, and ever since, its order volumes are on the rise.

“Earlier the order volumes would be around 3,00,000-4,00,000 pieces per season, but after setting up this office, orders have gone up to around 1.2-1.3 million pieces. As we are

# TÜV Rheinland: Charting a course to sustainability

The apparel and footwear supply chain is long and complex. It stretches from retailers, brands and agents, to factories that cut and sew material, to subcontractors and dyeing houses, and all the way to chemical suppliers.

The sustainability challenges are often exacerbated by a lack of harmonized and accepted standards and inconsistent local regulations. Multiplied by widely different understandings of what constitutes sound chemical management, and

frequently hampered by a lack of knowledge regarding substitution of hazardous chemicals.

Add inadequate access to a consistent supply of cleaner, recyclable chemicals across geographically dispersed production sites, and the sustainability equation becomes even more difficult to solve.

Stakeholders in many of the world's best-known apparel design, manufacturing and retail businesses

are turning to TÜV Rheinland for help on their sustainability journey. Designed and delivered by industry experts, our end-to-end sustainability portfolio enables businesses to quickly and effectively align themselves with industry standards.

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Orders  
volumes  
now  
**1.2 to 1.3**  
million pcs.

Order  
volumes/  
factory  
**40,000** pcs. to  
**50,000** pcs.

increasingly gaining confidence in Bangladesh, order volumes are bound to increase further. Earlier sourcing was more China-centric, where ALPINE PRO has 5 offices in different provinces,” explains Morshadul, who sources a wide range of sportswear, jackets, vests, jerseys, track suits, swimming trunks and so on from Bangladesh.

Women’s scarves and men’s winter caps are some new products (in accessories) that ALPINE PRO is planning to add to its sourcing basket now.

Despite increase in orders from Bangladesh, the country still accounts for only 10 per cent of the company’s total apparel sourcing volume. But Morshadul has worked out a strategy to increase the volumes without putting any extra pressure on the nascent yet liaison office.

“Currently we have only 3 people in our office, so it becomes very difficult to supervise all the factories. As most buying houses are well-equipped in terms of manpower, it is easier to work through them; besides most factories in Bangladesh are also comfortable working through buying houses. We have business tie-ups with 11 buying entities through which we place orders in around 17-20 manufacturing units,” underlines Morshadul.

Considering the cost-effectiveness of working through buying houses, Morshadul is not planning to increase staff strength of the liaison office as yet. But that does not mean he has no check and balances in place, and that after considering the erratic track record of some Bangladeshi factories.

“Last season, we had a big problem with one of the suppliers with winter jackets. The order got delayed by almost 8 months...,” Morshadul cites as an example.

ALPINE PRO prefers the buying houses to shortlist a few factories for every product, following which Morshadul visits the concerned units to assess those on various parameters, only after which an order is placed in consultation with its Prague-based headquarters.

“Even after the order is placed, we don’t leave everything up to the buying house... Follow-up and checking is a must at all stages in production,” says Morshadul.

ALPINE PRO places orders of around 40,000-50,000 pieces per factory to evenly distribute the total order volumes (which is usually 1,000-1,500 pieces per colour, and in each style, there are 2-3 colours).

When it comes to fabrics, Morshadul who has his own sourcing channels in China, evaluates the cost factor if sourced through buying houses or self, before finalising the orders. In terms of PD and styles, the Bangladesh liaison office is fully dependent on ALPINE PRO’s in-house team of designers at Prague, which with the help of state-of-the-art materials, well worked-out patterns and sophisticated details, prepare Spring/Summer and Autumn/Winter collections. What’s more, the proposed products are often entrusted to professional athletes who test them in a real environment and their comments are taken into account before the final product is made (be it in terms of functional properties or other aspects).

Now with 2020 Summer Olympics round the corner in Tokyo, Morshadul is hopeful of substantial increase in order volumes considering Japan and China are emerging as good markets for ALPINE PRO, and sizeable orders are expected from Japan keeping the upcoming sports extravaganza in perspective.

# V261

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## SHIMA SEIKI to exhibit at ITMA 2019 under the theme 'KNITify the World-Smart Solutions in Textiles'

Armed with many new offerings, leading computerised knitting machine manufacturer **SHIMA SEIKI MFG., LTD.** will be participating at the **International Textile Machinery Exhibition (ITMA 2019)** in Barcelona, Spain this June under the theme 'KNITify the World – Smart Solutions in Textiles'. The theme illustrates the flexibility of SHIMA SEIKI products to cater to the various industries, in addition to its traditional customer base in the apparel industry.

Held every four years in Europe, ITMA is known as 'the Olympics of textile machinery' and is the appropriate stage for presenting the latest technology to the textile industry. Wakayama, Japan-based SHIMA SEIKI's unswerving tradition of introducing new technology at ITMA remains intact and the 566 square metre booth of the company located at Hall 8.O, Stand B106 will see a comprehensive line-up of brand new **WHOLEGARMENT®** knitting machines, computerised flat knitting machines, computer graphic design systems as well as various digital solutions making their debut.

In its approach to present new proposals for non-fashion related industries, SHIMA SEIKI takes on the challenge of knitting what was previously deemed impossible to knit, or that which has never even been considered for knitting. Disrupting the conventional perception of knitting through its arsenal of patented knitting techniques combined with cutting edge hardware and software, SHIMA SEIKI offers the benefits of knitting to prospective customers who are as yet unaware of the true and current potential that knitting possesses. To this end, the latest technological contributions aimed at promoting knitted applications in various fields ranging from fashion, sports, shoes and accessories to medical, automotive, aeronautical, other wearable and industrial textile applications will be displayed at the SHIMA SEIKI booth.

Knitting offers great potential for technical textiles



with its inherent characteristics: stretch and compression. Flat knitting provides further potential as the only textile production method that can shape fabric on the machine. To this end, new knitting techniques such as inlay have gained particular attention for their capability to produce hybrid knit-weave fabrics that allow insertion of technical yarns, heretofore considered incompatible with knitting, into existing knit fabrics. These include carbon fibres, monofilament and even metallic yarns. SHIMA SEIKI has even developed a special device for unwinding spools of technical yarn to ease yarn feed for such difficult-to-handle material.

WHOLEGARMENT® knitting maximises the benefits of shaped knitting even further by expanding that potential to 3 dimensions. This form of knitting is capable of producing knitted items in their entirety on the machine, and allows 3D forms and tubing to be produced without sewing. Elimination of sewing allows for faster turnaround and high potential for on-demand knitting. The seam-free nature also ensures continuity of the fabric, allowing functional yarns such as those made from conductive fibres to wrap

around the entire body without interruption for applications in smart garments and wearable technology. 3D knitting provides fit, comfort, lightness and mobility – the key factors that make seam-free WHOLEGARMENT® knitwear ideal as wearable technology platforms.

*SHIMA SEIKI will also be speaking on smart textiles and wearable technology at the ITMA Speakers Platform as part of the ITMA Innovation Lab*

In addition to machine technology, the latest version of SHIMA SEIKI's SDS-ONE APEX series 3D design system will be presented as an equally important factor in modern day knit production. Flexible knit manufacturing begins with flexible design, and the APEX series offers a fully comprehensive set of tools and functions, as well as the capability for ultra-realistic simulation that realises Virtual Sampling. When countless variations must be evaluated before arriving at a final design, virtual product samples can be used to streamline the decision-making process by minimising the enormous amount of resources – time, cost and material – normally associated with producing actual samples for each variation. This allows for more designs and design variations to be considered with much less waste. When approved, the same data can be used to program machines for immediate knitting, significantly reducing lead times.

Apart from the technological innovations in hardware and software that make up the company's line-up of knitting machines and design systems, SHIMA SEIKI also provides various IT solutions for assisting its customers in establishing a smart supply chain. In addition to its staf® (shima trend archive and forecast) web-based product planning tool and Shima KnitPLM® production management and monitoring system, several other digital solutions will be on show for the first time. As such, SHIMA SEIKI has shed its traditional role of a manufacturer to become a truly full-featured solutions provider for the knitting industry.

With an all-inclusive collection of the latest innovative products and services, SHIMA SEIKI technology at ITMA 2019 will demonstrate smart, speedy and sustainable production that further secures its leading role in 'KNITifying the world'.



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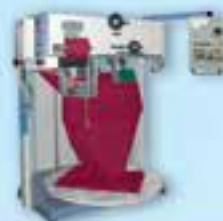
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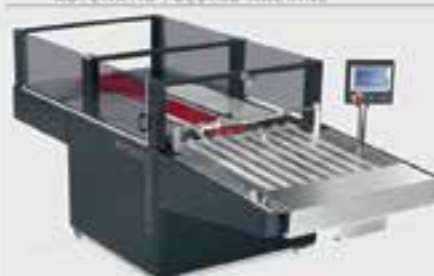
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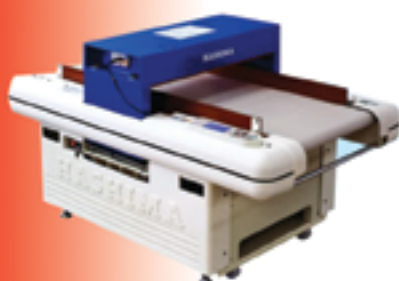


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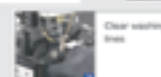
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## Focus Garment Tech Pte Ltd

1 Toh Tuck Link #03-00

Singapore 596222

Tel No: +65 63382256

Fax No: +65 63394976

Email: [sales@focus-gmt-tech.com](mailto:sales@focus-gmt-tech.com)

Website: [www.focus-gmt-tech.com](http://www.focus-gmt-tech.com)

## Focus Garment Tech Pte Ltd (Bangladesh Liaison Office)

Road #8, House #B-104, Ground Floor,

New DOHS, Mohakhali, Dhaka 1206

Tel No: 88-02-8713613

Fax No: 88-02-8713614

Email: [bangladesh@focus-gmt-tech.com](mailto:bangladesh@focus-gmt-tech.com)

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### FACE-TO-FACE WITH LECTRA

# AI, ML, IoT, MTM, ROBOTICS ARE NO MORE JUST BUZZ WORDS!

In recent years, digitalisation has been peddling with quite a rapid speed in the fashion industry and the impact of the same has been difficult to ignore especially at a time when a shift to e-commerce is in full force from bricks-and-mortar retail shopping. Digitalisation is revolutionising the way retail and manufacturing businesses operate with the use of Industry 4.0 technologies such as data analytics, artificial intelligence, Internet of Things (IoT) and cloud computing which lead to streamlined and efficient processes. Amidst this changing landscape, Lectra, a France-based leader in integrated technology solutions, is anchoring the concept of Industry 4.0 in its solutions to help the fashion industry pace up with the changing consumers' preferences for more personalised clothing. Team Apparel Online, in an exclusive tête-à-tête with **Céline Choussy, Chief Marketing and Communications Officer, Lectra**, unearthed the company's aggressive growth strategies, which include tapping each and every business model that exists in the fashion industry including mass production, agile production, mass customisation and on-demand production.



Céline Choussy, Chief Marketing and Communications Officer, Lectra

**AO:** Lectra's 2018 report states that the company faced macroeconomic instability against the backdrop of a trade war, yet it did positive throughout the year. How? What were the growth factors for Lectra that could generate positive revenues despite the instability?

**Céline:** Indeed! 2018 was a difficult year due to uncertainty in trade between countries and tough geo-political issues. Customers kept their queries on waiting mode following the protectionist measures announced and put in place first by the United States and subsequently by Europe and China. The growth came especially from fashion and furniture sectors whereas we struggled in the automotive market. In addition to all the new product launches that occurred in 2018 as per our strategic roadmap, we also announced the acquisition of the Italian company Kubix Lab, which has

created the product Kubix Link. We are sure that Kubix Link will become a great asset in the future, together with our new Industry 4.0-ready solutions.

**AO:** Consumers nowadays want personalisation of products with result; brands are changing their manufacturing models as per the consumers' needs and adopting customisation and on-demand methods. What are the available options for consumers, retailers and manufacturers to step forward in this rapidly changing new fashion era?

**Céline:** Actually, I feel there is no sharp shift from one trend to another trend. It is just a new trend that complements the former one. It's not an easy task to replace mass production seeing the growing population of the world, so a large number of consumers will still need some basic standard outfits such as basic jeans, shirts and trousers. At the same



time, today's sapient shoppers – the famous millennial and Generation Z, whose exacting requirements and revolutionary buying behaviour have left traditional retailers reeling – expect uniqueness, speed to market and more transparency when it comes to the product they buy. Therefore, to cater to each kind of consumer segment, Lectra has come up with new production models, mass production, agile production, mass customisation and on-demand production. In case of the models, a lot of intelligence has been applied not only in cutting but also in pre-production and downstream. But these are not aimed to replace mass production. With this, it has become easy for both retailers and manufacturers to switch between production models and manage the production orders, irrespective of the order quantities. Production plants can now easily switch from one production model to another, while maintaining the profitability and quality of operations.

*AO: Of all CAD/CAM suppliers, Lectra seems to be the strongest in terms of using Industry 4.0 strategy as its main business model. How is Lectra embedding 4.0 concept in its machines? Please share an example.*

**Céline:** Data analytics and Internet of Things (IoT) are something that we have been doing for more than 10 years now. Lectra is the only company in the market with a complete offer that combines software, machines, data and services – the four essential components for launching Industry 4.0 initiatives. Our equipment have more than hundreds of sensors, which are able to track, for example, when a potential failure is going to happen inside the equipment. This prediction is done by collecting maintenance data and production data of the machine based on which we can further find out if our customers are using that equipment at the optimal level. If they are not using it in the best way, we can figure that out and suggest them to use it in a much better way by changing some relevant parameters for instance.

Another aspect where we are using Industry 4.0 concept is to increase transparency and improve collaboration within an organisation. The collected data also helps our customers in comparing their different production sites altogether so that they can maintain or optimise their performance in each of the sites. If one of our customers has two production sites – one in Europe and the other one in Asia – then he/she can get

There is no sharp shift from one trend to another trend. It is just a new trend that complements the former one. It's not an easy task to replace mass production seeing the growing population of the world, so a large number of consumers will still need some basic standard outfits.

Key Performance Indicators on a Tablet through a dashboard as to how his/her European site is working differently from his/her Asian site and he/she can then have some benchmark between his/her sites and take the relevant decisions.

The need for collecting data and taking decision out of it was always there because it has been observed since decades that organisations sometimes take decisions based on their intuition or habits, but not on the basis of comprehensive facts and analytics. This represents a serious issue and we are glad Lectra is helping the industry to make informed decisions that are data-driven. Further, if we talk about Industry 4.0, then we have to talk about data intelligence. You might be wondering how this data is collected. Well, we do it for instance using our Quick Nest and Quick Estimate applications. Quick Estimate revs up product development efficiency and is instrumental in managing costs, while Quick Nest provides easy access to automatic marker making to handle heavy volumes of calculations in parallel, maximising productivity and marker efficiency. Both solutions capitalise on cloud technology. This way we can help the customers' optimise their way of working and propose them data-driven decisions on regular basis. Since everything is on cloud, they are able to use functions as quick as possible. Through all these collected data, artificial intelligence is becoming increasingly more significant.

*AO: Lectra's new cutting room fulfils the requirements of both on-demand and mass production. How is it different from the regular cutting room set-up? Does Lectra make it possible to address both the business models using single solution?*

**Céline:** We have different kinds of equipment for different kinds of business

models; for instance, Vector is for mass production, while our brand new Virga single-ply cutting line, that is part of 'Fashion On Demand' offer, is aimed at 'made to measure', 'customisation' or 'agile production'. However, the uniqueness of Fashion On Demand is that it combines a 4.0 ready equipment (Virga) that is connected and controlled by a cloud-based digital platform. By early next year, we will go one step further with the ability to connect Vector to the digital platform while new modules will be added to the platform in order to address mass production. With this, our customers will be able to orchestrate different kinds of equipment and different kinds of business production models.

*AO: CAM today is an established technology. However, the penetration of spreaders and automatic cutters is negligible. Why? Is it because of small scale of operations? Or, are there other factors too?*

**Céline:** Our major growth came from south-east Asia due to growing demand for CAM equipment. We have been exponentially growing in Bangladesh, Vietnam and Indonesia in last couple of years, so I don't see people are reluctant to use cutters when it comes to Lectra. We are certainly trending when it comes to bringing cutting equipment and technology into these countries but obviously, we don't deny that we don't face any challenges, one of them being the low wages that are still present there.

Surprisingly, we don't have much presence in India in CAM market (whereas we have a subsidiary there) and that is a question mark for me. Not just in apparel sector, we are yet to see rise for us in furniture and automotive industries as well. Maybe we need to put in more efforts in this vibrant

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market so that customers have a better understanding of our value proposition.

*AO: Everybody is talking about IoT, Machine-to-Machine Communication, Data analytics etc., these days. On one side, these technological interventions are primarily for the developed countries, while the major business for the technology suppliers is generated in the developing economies. Where does Lectra focus upon and how are you aligning these two markets together where the needs for the technology are quite different?*

**Céline:** As 4.0 concept mainly came from Europe, it's quite obvious and clear that large-scale demand comes today mostly from Europe and also from North America under the 'smart manufacturing' theme. But we are sure Industry 4.0 will spread its footprints effectively in other parts of the world as well in the next 10 years. It is not that AI, MTM, IoT are new concepts, it's just that these are now affordable and accessible which was not really the case before. As far as

developing economies are concerned, 4.0 is booming there. It gradually started making its presence in China but later on it went exponentially up because of the push given by the Chinese Government with 'Made in China 2025' programme. With this, China is geared up to transform all the basic manufacturing units into smart manufacturing units converting them from conventional processes to smart technological processes by embracing digitalisation.

Lectra is catering to the needs of both developing and developed economies. We have a great presence in China with many prominent fashion companies using our solutions to ensure a consistent flow of error-free data between processes, technology and people. To further strengthen our presence in the world, we have 32 subsidiaries covering around 100 countries which means that we are accessible to all major countries and their customers. However, we are quite aware about the fact that

some markets are a little bit behind in terms of digitalising the processes and some markets are far ahead. We are working with some advanced and progressive companies which have clear vision, forward thinking and on-point strategies, whereas the companies which do not have this kind of mindset, are always given time by us to think over; and meanwhile, we nurture their thinking process so that whenever they are ready, we can support them with our technology.

*AO: Machine Learning (ML) and Artificial Intelligence (AI) are becoming increasingly important. In automobile sector, companies are using ML and AI as tools that can help them predict when vehicle parts will fail or vehicles will need servicing. Lectra claims to actually use both AI and ML. Please share an example.*

**Céline:** As an example, let's look at the blades: they are the most significant consumable of a cutting machine. We have almost concluded an R&D project where our cutters automatically tell us how long the blade can last depending on the production type. More interestingly, once our system gets information from machines, it will prepare a 'Kit', which is directly supplied to the customers' place without them having to place an order; we call this 'automatic replenishment'. Simply put, we automatically deliver them those parts, which they are using the most based on the analysed data and they don't need to place orders. We do have multiple similar projects leveraging AI but we cannot really share all details.

*AO: 3D prototyping is very much talked about in the global apparel industry. However, no concrete use of such tools can be seen on a large scale. There are certain bottlenecks as well in terms of fitting. According to you, what are those bottlenecks and how Lectra is addressing these challenges?*

**Céline:** We saw 3D trend 20 years back in automotive and aerospace industries and knew it is coming in the fashion industry quite soon. We have a solution for 3D simulation which is already available in the market since long. It's called Modaris 3D which can effectively do the job of 3D

## Céline's Biography

Céline Choussy is Chief Marketing & Communications Officer at Lectra and has been a member of the Executive Committee since July 1, 2016. Céline began her career in 2000 at Dassault Systèmes as a Marketing Manager within the partnerships division. After five years of working at its headquarters in France, she moved to the United States to focus on strategic partnership with Microsoft. In 2008, she joined Autodesk as an EMEA Marketing Manager in charge of manufacturing solutions, and was later promoted to Global Marketing Manager. She joined Lectra in 2013 as Vice President Marketing, Automotive & Furniture before assuming the marketing responsibilities for all markets (2015) and communications (2016).



simulation and prototyping for almost every type of product. For instance, we are able to give exact fit in activewear, which is extremely fashionable these days. As an example, Decathlon, one of the leading French sportswear brands, is using Modaris to 3D prototype their products. They produce great rendering of sportswear with Modaris 3D. Our new Modaris version has made tremendous efforts and investment on rendering to make it as realistic as possible.

The major bottleneck for us is the customer's approach towards investing in new talents. One cannot expect a person who has been working on 2D throughout his life to instantly jump onto 3D and start giving output efficiently. This change in mindset cannot be done overnight, that's why the companies need to invest not just in technology but in people as well. One needs to invest in schools, universities and institutions, making sure that skilled students come out and can work in the industry. We, at Lectra, are extensively focusing on this training part as we are involved in educational programme with leading worldwide universities. We provide them with our software, train their professors who further train the students.

**AO:** *Designers and brands in Europe and USA are aggressively working on creating 'zero waste design'. What's your take on this and what is the contribution of Lectra in achieving 'zero buffer'?*

**Céline:** Zero buffer is, basically, in our DNA. We have multiple equipment that have zero buffer technology embedded, such as Vector, Virga 'Fashion On Demand' solution, but there is one thing to consider for the users to get the best use out of this feature. Zero buffer always depends on the fabric parameters and its complexities. We are going to launch another solution towards zero buffer particularly for automotive industry and we will release it for fashion industry once we see the response of the market. Our competitors claim to have such a kind of technology, but proof is there that they don't have zero buffer in their solutions. It's easy to check it out as a company; ask them for cutting tests.

**Lectra uses a lot of artificial intelligence, IoT and machine learning in its solutions and for these to efficiently run, we need those kind of people who know about the technology that we are using. Now Lectra has hired data scientists and cloud specialists among other specialists.**

**AO:** *Lectra's 2017-2019 strategic roadmap consists of launching its 4.0 offerings in a few pilot countries. Which all countries you have identified under this strategy of yours in 2017 and 2018?*

**Céline:** When we were almost ready with our 'Fashion On Demand', we had pilots in Italy and in France. We further identified pilot projects in China too and we want them to be ready for CISMA that is happening in September this year where we will commercially launch our 'Fashion On Demand' and other 4.0 solutions in Asia. Moreover, we are also starting pilots in Indonesia, Japan and Vietnam as well.

**AO:** *Lectra's investment in its R&D activities is about 12 per cent of total revenue and that's an impressive figure. How has this expenditure on R&D helped the organisation and in which all areas of technical excellence?*

**Céline:** Lectra invested approximately US \$ 30 million in last five years in its solutions such as cloud, SaaS, Fashion On Demand, etc. Because of this huge amount of investment, we have seen the rise of technical excellence in different ways as it has helped us in getting right kind of people with right kind of skills. As I have already said, Lectra uses a lot of

artificial intelligence, IoT and machine learning in its solutions and for these to efficiently run, we need those kind of people who know about the technology that we are using. Now we have hired data scientists and cloud specialists among other specialists. We also make sure to continuously train our teams on the latest technologies. Not just on people, we have invested a lot of money in our own factory premises to implement Industry 4.0. For instance, we are using a lot of smart robots for material movement. Moreover, we recently inaugurated an innovation lab, so it really matters for us to incubate the new ideas and we keep doing this.

**AO:** *South Asian and south-east Asian countries always look for low-cost automation. In such a scenario, what's the strategy Lectra is following to strengthen the roots in these markets?*

**Céline:** Going for cheap solution is a very short-term response to an immediate need. If you want to build a solid plan for the future, you have to look at the solution with a 360 degrees perspective, looking at the exact Return on Investment calculation. I have never seen a strong company that has not invested in the beginning because that's a question of staying alive in the competition. Lectra is a premium brand indeed and is much faster, reliable and productive than all the available suppliers in the market. If companies are comparing us with others on the upfront cost, then yes, we are more expensive. But compare us in terms of productivity and quality and we can prove them that they can get better efficient production with better quality, less machine breakdowns which save the maintenance cost as well, besides less production stops, less delay in order delivery, etc. Cheap is not a long-term strategy and companies need to understand that the pace of today's market is rapid and they have to keep up with this pace. They need to have reliable equipment and systems and keep their peace of mind and energy intact to focus on their future growth.

# Jack Single Needle Lockstitch Machine

## Minnow taking the mighty head-on

*Chinese sewing technology provider Jack has been raising quite some eyebrows due to its unprecedented growth in less than two decades since its inception in the early 2000s. Considering ‘stability + sewing performance+ leading technology’ combination as its mantra, Jack has tapped a larger share in the sewing industry worldwide, and as a result, it is now reportedly the largest sewing machine supplier in the world in volume terms. In Bangladesh (the second biggest apparel exporter globally), the company keeping up with its growth trend, has also made steady inroads.*

“We made our debut in the lucrative Bangladesh market in 2004 and since then there has been no looking back for the company. With innovation, performance, quality, acquisitions and strong sales support, we have achieved nearly US \$ 25 million in Bangladesh in just 15 years,” claimed Nelson, Country Manager (Bangladesh), Jack.

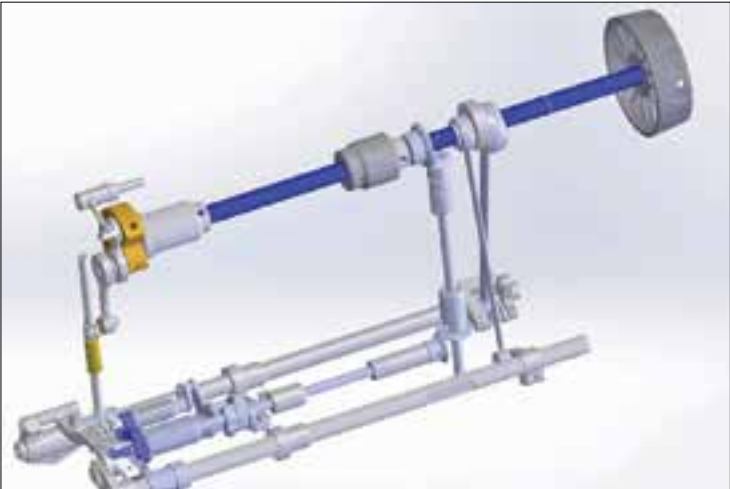
Jack’s phenomenal growth, be it in Bangladesh or globally, can be attributed to its continuous efforts towards innovating its technology according to the global trends and its customers’ requirements which have existence all across the world.

Notably, Jack has a plethora of products in its basket right from lockstitch machines, interlock machines to overlock machines, while it has also acquired the reputed European companies such as Bullmer (cutting technology), MAICA (shirt automation) and Vibemac (jeans automation) which makes the complete portfolio of the Chinese brand even more trustworthy and interesting.

The present article talks about the evolution of its famous A-series of its lockstitch machines, a series which gradually evolved from the company’s first lockstitch machine named F4, and over the years, has reached to A6F model, passing 5 generations successfully.

### A2

A2 is a direct drive automatic lockstitch machine, the very first product of Jack’s famous A-series lockstitch



A3 Single Shaft Design



Jack A6F Single Needle Lockstitch Machine



machines. The main USP of this machine is its automatic thread trimming function, which greatly saves trimming time while sewing a garment product. Generally, in a normal SNLS machine with clutch motor, the operator uses scissors, picks it up, cuts the thread, puts it back and this process takes at least 2 seconds to complete. However, A2 machine completes this thread trimming process in just 0.1 seconds and claims to improve trimming efficiency from minimum 37 per cent to 100 per cent. This further reduces cost and increases work efficiency on a sewing station.

Another feature of the machine is that it is equipped with 3-level shinning LED light which offers adequate brightness, making it more convenient for threading, and therefore, reduces visual fatigue. Automatic thread efficiency trimming machine hose achieves high automatic thread trimmer.

## CASE STUDY

If a production line at shopfloor produces 800 garments per day and each piece takes two times thread cut (minimum), then all the garments will need thread trimming up to 1,600 times which equals to 3,200 seconds or 53.33 minutes. Given that A2 is trimming thread in just 0.1 seconds, installing this machine will get the job done in just 5.33 minutes collectively in a day for the complete line. This indicates that at least 48 minutes can be saved in a day which is a huge saving for an exporter in today's cost-competitive era.

## A3

This is the upgraded version of A2 machine and is characterised as a computerised lockstitch sewing machine, with automatic functions such as automatic trimming and fully programmable function with knee lifter. The machine is suitable to sew both light and heavy fabric garments. A3 machine, although not a special material machine for heavy duty, still performs considerably well on a product like jeans. The machine does not skip thread even if there is side seam of heavy thickness in a jean. As far as light fabrics are concerned, A3 eliminates the wrinkle issue on these delicate fabrics during sewing operation with high speed, great puncture force, light torque, low failure rate and less maintenance.

According to Jack, the reason for smooth sewing operation of heavy fabric is its single shaft design. One shaft design reduces the machine torque and makes feeding smoother. Markedly, this single shaft design is patented by Jack.

## A4

For intelligent solutions, internal voice communication is the most important part to make it easy for the operator to understand how to operate the machines. This is what the first speaking machine in the world, A4, an upgraded version, obtains with its voice feature. The incorporated voice sensors can sense any of the minor breakdowns and alert the operator about technical glitch. This way, the



**NELSON**  
Country Manager  
(Bangladesh), Jack

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## Comparative Analysis of Jack's A-series Lockstitch Machine

Features	A2	A3	A4	A4S-W	A4S-WN	A5	A5-N
New design	✓	✓	✓	✓	✓	✓	✓
LED light	✓	✓	✓	✓	✓	✓	✓
Stitch by stitch button	✓	✓	✓	✓	✓	✓	✓
Automatic thread trimmer	✓	✓	✓	✓	✓	✓	✓
Electronic tension post	×	✓	✓	✓	✓	✓	✓
Reverse switch button	×	✓	✓	✓	✓	✓	✓
Automatic presser foot lifter sensor	×	×	✓	✓	✓	✓	✓
USB port	×	×	✓	✓	✓	✓	✓
Voice reminder	×	×	✓	✓	✓	✓	✓
Sealing oil pan	×	×	×	✓	✓	✓	✓
Min 3 mm remaining thread	×	×	×	×	×	✓	✓
Head semi-oil	×	×	×	✓	✓	✓	✓
Bird's nest prevention device	×	×	×	×	✓	×	✓
Needle feed	×	×	×	×	×	×	×
Large operational space	×	×	×	×	×	×	×
Touch screen	×	×	×	×	×	×	×
Auto production outline	×	✓	✓	✓	✓	✓	✓
SPM (stitches per minute)	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Time to market	✓	✓	✓	✓	✓	✓	✓

downtime can be reduced and production can be improved. Right now, the machine comes installed with 8 languages.

Another significant patented feature in this machine is its presser foot sensor. When sewing operation is about to start, the presser foot lifts automatically within a second and no involvement of operator is required for the same. Now, the question is what are the advantages of this function? Firstly, it improves the efficiency as compared to the lifting operation done by human intervention. Secondly, in case of some old machines in some factories, the presser foot is lifted by knee of the operator which, over a certain period of time, causes knee pain. So, with engineered design keeping the ergonomics standard and efficiency on top priority, A4 provides a great solutions to operators.

The A4 model has two variants; A4S-W and A4S-WN. While A4S-W comes studded with an added feature such as sealing oil pan, A4S-WN is installed with a patented bird nest prevention device. The bird nest prevention device



Jack A5 Single Needle Lockstitch Machine

leaves no jumbled up threads under the backside of the fabric during initial sewing, which can reduce the tail cut process and make the stitches beautiful.

### A5 ►►

A5 SNLS machine is termed as the 'First thread cleanness' computerised machine in the world which has a number of patented features such as digital alert system for oil shortage and oil level, bird nest prevention system, auto thread trimming, machine head oil free system, 3 mm end sewing thread trail and coaxial driving unit. The machine is also a conglomerate of auto bobbin winder, multi-presser foot, suction device and electronic thread tension release system. A5 has a working space of 300 mm which makes the operation easier for the operator.

The coaxial driving mechanism reduces the vibration generated from driving force. The coaxial shaft replaces the conventional two-axle joint mechanism which keeps the sewing stable throughout the operation. Further, A5, with the function of short thread tail, makes the thread tail within 3 mm after trimming, thus reducing the thread tail cut process, saving time and labour cost. Significantly, the stitches won't disperse even if the thread tail is only 3 mm (maximum) because of the condense stitch function. Jack achieves this much perfection as A5 uses double knife for trimming operation.

### A6F ►►

This model is computerised needle feeding lockstitch and the latest available model in A series. A6F is the first machine of Jack which comes equipped with touch screen feature. The USP of this model is computerised needle feeding which increases the feeding capacity, prevents dislocation and improves the sewing quality.

The other features include needle and feed dog synchronised feeding with double knife movement and ending condense stitch design. Markedly, A6F model has 300 mm operational length of the bed that makes stitching even easier for operators. This machine comes equipped with auto bobbin winder, hand wheel with cooling fan and auto presser foot lifter which make the machine an advanced one.

## NAVIS TUBETEX

TO SHOWCASE TECHNOLOGICAL  
INNOVATION AT **THE UPCOMING  
ITMA 2019**

**N**avis TubeTex, a leader in finishing machinery, will be exhibiting its latest technological developments at ITMA 2019, the world's largest international textile and garment technology exhibition, being held in Barcelona, Spain.

The company will be showcasing its latest developments in energy reducing features, advanced finishing technologies for quality and efficiency enhancements.

On display will be the latest modular, tubular and open width compactors including the industry standard Pak Nit e3+ Tubular compactor and TM-100 Open Width Compactor.

Also on display will be its all new N-Dura stenter dryer with a completely redesigned air flow system. The machine features EQ Air flow system, which is designed utilising sophisticated and highly accurate engineering model resulting in the most even air flow system ever designed for stenter application.

The totally redesigned Tandematic product line will be another area of attraction at the company's booth in the event. These are the company's most robust guiding, cutting and decurling systems for knits and woven fabrics. The company will be displaying the new look, feel and functionality of these products.

Moreover, visitors will also be able to see Consultex rotary system, the new system of saving for print preparation for digital printing. These patented coating technologies can be integrated easily into the production lines resulting in increased throughput, while maintaining precision coating and system performance. Along with this, spray system for various textile applications will also be on display.

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# Blue Kaktus

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- ☐ User friendly
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- ☐ Customized for specific business needs
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- ☐ 24/7 support
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Soheb  
+880 1721386799  
Sanjai Saxena  
+91 98118 40088

Shakil Alam  
+880 1711506474  
Aich Shoumen  
+880 1711-081511



# IS WORKERS' WELFARE ONLY SUPPLIERS' RESPONSIBILITY?

A RECENT REPORT UNDERLINES HOW BUYERS' PRESSURE TACTICS ARE PROMOTING WORKERS' ABUSE



‘I made this item you’re going to buy, but I didn’t get paid for it...’, this was reportedly the message left in notes by workers from a local garment factory that supplied Zara and other international brands in Istanbul, in 2017.

Read by end-users who were upset to no end, reactions flew thick and fast forcing brands to resort to remedial measures. These were the workers of a manufacturing unit that went bankrupt a year earlier and failed to pay the workers.

This case, which hit the headlines, is not an aberration. There are many such cases that go unreported, maintain industry insiders pointing towards the question if workers’ welfare is only the vendors’ responsibility.

Bangladesh, the world’s second biggest garment exporter, apparently is a victim of such apathy where despite spending substantially towards workplace remediation and safety measures conforming to the buyers’ norms, the industry is reportedly not getting any support from them when it comes to pricing.

“In price negotiations, we have been unable to take collective initiatives. No matter what the buyers say, we should be firm and strong. There is no country that has the massive capacity as Bangladesh,” underlined the new **BGMEA President Dr. Rubana Huq** speaking to *Apparel Online* in an interview.

As per some experts, if Bangladesh has increased workers’ wages by 263 per cent over the last 10 years, prices have fallen by almost 6.63 per cent and 7.33 per cent from USA and Europe, respectively.

The pressure created by the buyers is not however restricted only to price points. Its manifestations have impacted every aspect of a worker’s livelihood, which has been highlighted by a recent report that shows how pressure from global retailers leads to abuses in factories.

This report from Human Rights Watch (HRW) maintained that despite public commitments from global apparel brands for fair and safe labour standards, retailers are incentivising their suppliers to take cost-cutting measures that result in perilous and abusive work environments.



As per a HRW report despite public commitments from global apparel brands for fair and safe labour standards, retailers are incentivising their suppliers to take cost-cutting measures that result in perilous and abusive work environments.

**ARUNA KASHYAP**  
Senior Counsel  
at HRW

"We have brands and retailers saying to factories that there should be a certain standard of working conditions in the factories, but then they do not accurately cost for it..."

Titled *Paying for a Bus Ticket and Expecting to Fly: How Apparel Brand Purchasing Practices Drive Labor Abuses*, to mark the sixth anniversary of the Rana Plaza tragedy, **Aruna Kashyap, Senior Counsel at HRW** and the report's author while speaking to media, stated, "We have brands and retailers saying to factories that there should be a certain standard of working conditions in the factories, but then they do not accurately cost for it..."

As per the report of the HRW, which reportedly spoke with suppliers across Asia, it allegedly found that companies were not adjusting pricing for local wage increases; they were also shortening the due dates for shipments and delaying payments to suppliers – all of which worsens labour abuses in the factories.

This has once again brought the focus back on brands/retailers' responsibility towards the workers and how they can support the vendors in this regard by stopping the pressure tactics through fair pricing.

As per media report that appeared a year ago, one of the tags, taken from a polo shirt of a US retailer, showed a retail price of US \$ 42 (Taka 3,475) even though the item cost only around US \$ 3.30 (Taka 273) from its manufacturer in Bangladesh.

"It is a common practice for buyers to charge double or triple of what they pay for an item to the manufacturer," reportedly alleged **Dr. KI Hossain, President of Bangladesh Garment Buying House Association**, while interacting with the media then.

"Overcapacity is a reason behind low manufacturing prices. It makes manufacturers desperate for orders, so they quote lower prices to get the orders and remain operative," reportedly maintained **Dr. Khondaker Golam Moazzem, Research Director** at the Dhaka-based think tank, **Centre for Policy Dialogue (CPD)**.

No matter whatever is the reason, there has to be certain dignity towards those who are responsible for dressing us up, and if the brands/retailers could support them by compromising a little on their profit margins, it could definitely go miles towards building a truly sustainable apparel industry.

Bangladesh

# THE POPULAR CHOICE FOR GILDAN

It's not very often that one hears of a global biggie expanding its footprints in Bangladesh, more so when upcoming manufacturing hubs like Ethiopia are hogging all the limelight at the back of diverse advantages that it reportedly enjoys over others, thereby enticing many to set up their plants in Ethiopia, including some prominent names from Bangladesh as well.

However, Montreal-based Gildan Activewear Inc. seems to be an exception. The company which manufactures and markets activewear products (including T-shirts, fleece tops and bottoms, sport shirts, dresses, casualwear, workwear, liner, therapeutic socks and many more) in North America, Europe, Asia-Pacific and Latin America, has reportedly decided to expand its footprints in Bangladesh by building a large complex to complement its existing operations in the country and in Central America and the Caribbean.

The announcement in this direction was made when the company recently unveiled its financial report (as per which, its net income for the three months ended March 31 decreased to US \$ 22.7 million or 11 cents per diluted share, from US \$ 67.9 million or 31 cents per share a year earlier).

"The company believes the buildout of a large-scale manufacturing hub in south-east Asia will significantly enhance its positioning to service international markets and support other key sales growth drivers," underlined Gildan in a news release.

As per media reports, Gildan reportedly purchased a large land parcel recently for US \$ 45 million to build a vertically integrated manufacturing plant that would expand its textile and sewing operations.

To be operational by 2021, Gildan's multi-plant complex would be large enough to reportedly support more than US \$ 500 million in annual sales.

It may be mentioned here that Gildan has a vertically-integrated unit (GAB Limited) located at Palashbari, Ashulia, with knitting, dyeing, finishing, cutting and sewing facilities.

It was in 2010 that Gildan first hit the headlines in Bangladesh when it announced acquisition of Shahriyar Fabric Industries Limited (Shahriyar),

2010

Gildan announced acquisition of Shahriyar Fabric Industries Limited (Shahriyar), for a total purchase price of approximately US \$ 15 million.

■ Sri Lanka's MAS Holdings Limited has a very modern lingerie manufacturing unit located at Karnaphuli EPZ, in Chittagong.

■ Hop Lun Apparels Ltd. of Korea is another big name to have its manufacturing unit in Bangladesh.

for a total purchase price of approximately US \$ 15 million.

Shahriyar owned and operated a vertically-integrated knitting, dyeing, finishing, cutting and sewing facility for high-quality ring-spun T-shirts with annual T-shirt production capacity of 2.2 million dozens.

The company then maintained that the acquisition of Shahriyar is the end-result of substantial analysis carried out to identify a strategic location to begin the development over time of a potential major vertically-integrated manufacturing hub in Asia with an infrastructure and geographical location to position Gildan as a low-cost, high-quality producer to serve its target markets.

Now with the new multi-plant complex expected to be operational in the next couple of years, Gildan's plans to better serve its target markets would get a further fillip.

It may be mentioned here that Gildan is not the only global entity to strengthen its position in Bangladesh. There are several big names from many countries which are operating successfully in Bangladesh for many years now.

Sri Lanka's MAS Holdings Limited (which manages a portfolio of businesses with revenue of US \$ 1.8 billion and is positioned as one of the world's most recognised design to delivery solution providers in the realm of apparel and textile manufacturing) has a very modern lingerie manufacturing unit (MAS Intimates Bangladesh Private Limited) located at Karnaphuli Export Processing Zone, in Chittagong.

Hop Lun Apparels Ltd. of Korea is another big name to have its manufacturing unit in Bangladesh.

Going by the present trend and the so-called pro-business approach of the incumbent Government, under which foreign investments have increased significantly in last few years, it would not be a surprise if Bangladesh emerges as a popular destination for setting up of apparel manufacturing units by renowned global entities in the coming days.

# Is the Government shifting focus from RMG sector?

Readymade garment sector is the principal export-oriented sector of Bangladesh and considered the backbone of the country's economy. It's not only the biggest export earner but also the provider of large-scale employment opportunities.

However, there are many other sectors that are coming up strongly – leather and leather products, pharmaceuticals, ceramics, etc., to name a few.

Economists and experts are in favour of promoting the leather sector more strongly as they feel, after RMG, leather and leather products hold the highest export potential. Keeping the same in mind, the Bangladesh Finished Leather, Leather Goods and Footwear Exporters' Association (BFLLEA) in April this year demanded a uniform policy for all export-oriented sectors with regard to duties and other taxes, so that the leather sector can enjoy more benefits.

Some sectors are provided with high privileges, depriving others. It should be uniform for all sectors...

Therefore, product diversification is needed to increase exports and reduce risk. For that, sectors with potential such as the leather industry should be promoted like the RMG sector, and a uniform policy is required, underlined some entrepreneurs involved with the leather industry.

The entrepreneurs' plea seems to have moved the Government, which is now reportedly planning to extend the same facilities that the garment sector enjoys to others in an effort to diversify the country's export basket and reduce dependency on apparels.

"In case of diversification, we will give the same facilities that we are giving to the garment sector this year," underlined **Chairman of the National Board of Revenue (NBR) Md Mosharraf Hossain Bhuiyan**.

Bhuiyan made these observations at a luncheon meeting of the American Chamber of Commerce and Industry in Dhaka recently.

It may be mentioned here that the apparel sector enjoys a host of benefits including 4 per cent cash



incentive on exports to new destinations, lower corporate tax and bonded warehouse facility.

The Government's move to incentivise other sectors has raised a question amongst certain section of garment makers, who are afraid that by doing so, the desired focus and attention on readymade garments could get diverted.

"Diversification is good for economic development as dependency on one particular sector can have certain ramifications," maintained **Dr. Khondaker Golam Moazzem, Research Director** of prominent civil society think tank **Centre for Policy Dialogue (CPD)** speaking to *Apparel Online*.

But considering that the readymade garment sector is the principal export earner and mainstay of Bangladesh's economy, Moazzem proposed restructuring the incentive procedures and parameters for garment industry to give the desired impetus (so that the focus on the apparel sector is not diluted) to it.

"The Government is incentivising the garment industry in various aspects but somehow that is not yielding the desired results; such measures are falling short of making any incremental contribution," observed the Research Director of CPD.

Moazzem as such advocates incentivising the garment makers in terms of product diversification (making value-added and critical products which are in demand and fetch better margins), to inculcate better manufacturing practices through technological interventions, market diversification, etc. This would effectively promote the apparel sector while also encouraging and endorsing other export-oriented sectors, to balance things out accordingly.

## Coming of age of a home- grown safety platform

It was in the aftermath of the Rana Plaza tragedy that global brands introduced Accord and Alliance - representing two different sets of retailers - in the Bangladesh RMG sector. The move was as much to ensure safe and secure manufacturing units that they source from as it was to maintain their reputation in the global arena as responsible corporate entities, which valued human lives more than anything else.

A lot of water has flowed down the bridge since. After spending years together carrying out remediation of supplier factories, Alliance called it a day, while Accord has approached the judiciary hoping to stay put, citing so-called unpreparedness of the local entity to carry forward and supervise its pending work.

Accord's opinion as to the aptitude and expertise of local remediation has raised a question on Bangladesh's ability to stitch together an efficient remediation entity that can carry forward the good work of Accord and Alliance while being acceptable to all. After all, foreign entities cannot continue to operate forever.

It was just a matter of time before Bangladesh would prove the apprehensions wrong! Nirapon, a new self-regulating platform, has emerged very strong recently to take over from Alliance the overseeing of building inspection and remediation of its listed factories in the country.

**Professor Jamilur Reza Choudhury**, a prominent **Architect of Bangladesh, and Chairman of Nirapon board**, reportedly announced the formal launching of the platform recently.

"I am proud to announce the inauguration of a brand-initiated, locally-oriented organisation, 'Nirapon, whose mission is to strengthen the safety achievements that Bangladeshi RMG industry has reached so far," stated Jamilur, adding, "...it will use a brand-led approach of safety monitoring, oversight and reporting services for our subscribed members based on the laws of Bangladesh to help member factories build their own self-sustaining culture of safety."

Nirapon's role would however be slightly different from Alliance. Alliance worked directly with



**21** AS OF  
member brands  
and over **600** UNDER  
factories **NIRAPON**

### MOUSHUMI M KHAN

CEO, Nirapon

"In this transition to help build a more locally sustainable safety culture, Nirapon will vet, test and train local engineering and training service providers..."

factories to drive remediation and training programmes while Nirapon's role would be of oversight and independent verification of safety and training compliance and to report these results to members.

Speaking to media on Nirapon's activities, **Moushumi M Khan**, its CEO reportedly underlined that Nirapon was created as a common platform by global RMG brands for whom Bangladesh is an important sourcing destination to sustain and was build on the past six years' remarkable safety achievements.

"As of today, there are 21 member brands and over 600 factories under Nirapon," said Moushumi adding, "Nirapon builds on the achievements of Alliance's successful remediation efforts and our goal of worker safety remains the same. However, the Nirapon model is fundamentally different."

As per reports, all the Nirapon-member brand factories would be required to continue to meet the National Action Plan-harmonised standards for physical safety of structural, fire and electrical components.

The member factories will perform routine maintenance and safety training, and continue to work with a proven effective helpline. The factories will provide regular updates, including documentary evidence, to the brands and to Nirapon, and work with vetted local training and engineering firms which will conduct regular safety and training audits.

Nirapon will provide oversight and quality assurance on the work of the factories, and their engineering and training consultants. The brands will work with the factories to assist them in addressing any problems that may arise.

"In this transition to help build a more locally sustainable safety culture, Nirapon will vet, test and train local engineering and training service providers, who will be selected and retained by factories themselves, to give independent assessments of a factory's compliance to build safety and Nirapon processes," Moushumi emphasised.

# How real is robot threat to garment workers?

President of Bangladesh Association of Software and Information Services fears around 60 per cent garment workers will be replaced by robots by 2030

As per an estimate, USA lost around 5.6 million manufacturing jobs between 2000 and 2010. Of this, if 13 per cent of job loss was the result of moving of facilities offshore, 85 per cent of the job losses were due to the productivity growth of robotics and machinery. It further predicts that by 2025, the global average of manufacturing tasks being done by robots will grow from 10 per cent to 25 per cent across all industries.

With labour wages and production costs going up in the textile and garment sector, more and more people are now turning to technology and why not? As per experts, a robot working under the guidance of a single human handler, can make as many shirts per hour as about 17 humans.

This trend is not restricted to the West only! According to some, technology would have a major impact on the Asian manufacturing industries that have been leveraging cheaper wages so far. Estimates by the International Labour Organization underline that robots will replace around 64 per cent of textiles, clothing and footwear workers in Indonesia, 86 per cent in Vietnam, and 88 per cent in Cambodia.

It may be mentioned here that **World Bank President Jim Yong Kim** in a conference last year maintained that about two-thirds of jobs in the developing world may be lost due to automation, while an ILO report on textile and clothing sector in ASEAN underlined that the textile, clothing and footwear (TCF) sector is at the highest risk of losing jobs to automation.

The second biggest apparel exporter globally, Bangladesh, does not seem to be an exception either. As per a top Bangladesh Association of Software and Information Services (Basis) official, around 60 per cent of garment workers in Bangladesh will lose their jobs by 2030 and will be replaced by robots because of the automation installed by the factory owners.

"...evidence increasingly suggests that while large parts of many jobs will be subject to automation, relatively a few jobs will in fact be completely automated. This is very alarming for Bangladesh...", maintained **President of Basis, Syed Almas Kabir** while presenting a keynote paper on Fourth Industrial Revolution – Preparations, at a meeting in Dhaka recently.

According to him, leather sector – the next most potential sector in terms of exports after RMG – is expected to be impacted as well with around 35 per cent workers engaged in the labour industry likely to be replaced by robots.

At this event organised by the Bangladesh-Malaysia Chamber of Commerce and Industry (BMCCI) and attended by diplomats, Government officials, exporters and importers, **Salman F Rahman, Private Industry and Investment Affairs Adviser to Prime Minister Sheikh Hasina**, called upon the entrepreneurs to prepare themselves to face the challenges of the fourth industrial revolution.

"The challenges poised to be created due to the fourth industrial revolution will be extremely tough. We need to adopt and model our own network in line with those latest technologies," Rahman said, while **Amir Farid Abu Hasan, acting Malaysian High Commissioner to Bangladesh** on his part observed, "We see changes in the mode of production, having huge impacts on the job market and economy. Traditional jobs are in danger and are no longer relevant as new occupational requirements are needed." Hasan as such stressed on skill development and policy changes to fill the gaps rising out of the fourth industrial revolution.

"I cannot deny that Governments need to take immediate action to avoid the risk of unemployment due to this robotic revolution," the acting Malaysian High Commissioner underlined.



# WAGE HIKE

## A DOUBLE-EDGED SWORD FOR THE GARMENT WORKERS?

When the new minimum wage was implemented in Bangladesh early this year, garment workers were hoping their lives would change for the better. After all, the wage hike as per the wage board has been quite substantial (from Taka 8,000 to Taka 12,000), and came to effect after a wait of three long years.

But little did they know that it would prove to be a double-edged sword.

As per a study conducted by Transparency International Bangladesh (TIB), after the wage hike, production target for the workers has been increased by 30 to 36 per cent. What's more, the report also underlined that if the workers cannot meet the production target, they are forced to work extra hours without overtime, assaulted by management and even restricted from going to the toilets.

Unable to cope with the work pressure and hard to achieve targets, if some have allegedly left their jobs, many more have reportedly been thrown out by the management. And the

number of such workers thrown out by the factories is apparently quite high.

As per **Secretary General of Industry All Bangladesh Council, Salahuddin Shapon**, 10,000 workers were rendered jobless after implementation of the new wage structure while 12,000 have been terminated during the workers' protest demanding wage hike.

Under the given circumstances, garment workers are reportedly living under constant fear of losing jobs, claimed labour leaders in Bangladesh.

A recent media report cited one such garment worker who was forced to resign from his job and had to resort to hawking goods of daily necessity to eke out a livelihood.

"I had to stitch 80 to 100 apparels per day, but after the wage hike, I was asked to stitch 180," reportedly alleged the garment worker who worked for a prominent garment manufacturer in Dhaka, while speaking to the media.

**Babul Akhter, President of Bangladesh Garments and Industrial Workers Federation**, addressing the media, alleged that after the wage hike, factory owners increased production targets, began sacking and introduced new technologies to cut down workforce and lower human dependency in manufacturing.

However, speaking to *Apparel Online*, **Sarfraz Mehdi Anwar (Upol) – Director of Lyric Group**, maintained that his organisation has definitely not increased targets for workers as has been cited in certain studies and reports about the industry and neither has the organisation thrown out workers on account of the same.

"Efficiency increase is a continuous process and all manufacturers try to achieve higher efficiencies by various means, but that necessarily does not mean to force the workers to work more or substantially increase their target overnight," underlined Upol.



**SARFARAZ MEHDI ANWAR (UPOL)**

"Efficiency increase is a continuous process and all manufacturers try to achieve higher efficiencies by various means, but that necessarily does not mean to force the workers to work more or substantially increase their target overnight."

**I**t seems the issue of minimum wage would never end for Bangladesh! After a long wait, it was in December last year that the country's wage board decided to hike the minimum wage to Taka 8,000 (US \$ 96) from what was Taka 5,300 (US \$ 69) per month in 2013, the year the garment workers last witnessed an increase in their monthly wages.

As per the boards' proposal, Taka 8,000 (as minimum wage) was decided for the workers of grade VII, which included basic pay of Taka 4100, 50 per cent of basic pay as house rent, Taka 600 as medical allowance, Taka 350 as travel allowance and Taka 900 as food allowance. For grade VI, the wage board proposed Taka 8,399 as gross monthly pay with Taka 4,366 as basic pay; for grade V, Taka 8,855 as gross pay with Taka 4,670 as basic; for grade IV, Taka 9,245 as gross pay with basic at Taka 4,930; for grade III, Taka 9,578 as gross pay with basic at Taka 5152; for grade II, Taka 14,621 as gross pay with basic pay at Taka 8,514; and Taka 17,504 as gross pay with Taka 10,436 as basic pay for grade I.

# THE CONTENTIOUS ISSUE OF MINIMUM WAGE THAT REFUSES TO DIE

The moment, the board's decision came to light, the country erupted into mindless violence with garment workers taking to the streets, vandalising properties, stalling production work in factories and holding the industry to ransom, to protest what they termed 'discrepancy' in the wage structure! The more than a week long mayhem that followed forced the Government to relook into workers' grievances and make the necessary changes. This somewhat subdued the workers' rage, who slowly but steadily returned to their respective workplaces and the industry got going.

Despite counting major loss due to stalling of work, factory owners heaved a sigh of relief and so did the country, for which the garment sector is its economic backbone. But as the anniversary of the infamous Rana Plaza disaster neared, it was now turn of the anti-graft watchdog Transparency International Bangladesh (TIB) to rake up the issue of minimum wage once again!

As per a TIB report unveiled just before commemoration of the Rana Plaza disaster, it alleged that in actual terms, wages of apparel workers in Bangladesh decreased by 26 per cent even as the factory owners claimed that they had raised the wage by 23 per cent in the new wage structure keeping with the Government's declaration in January this year.

As per TIB researcher Nazmul Huda Mina, the claim of 23 per cent wage increase is not reality. Mina explained that in 2013, the minimum wage for grade VII workers was Taka 3,000. As per the law, the wage would have reached Taka 3,829 by the end of 2018 after adding five per cent increment yearly. Now, the wage for the grade should be Taka 5,207 if the wage increased really by 36 per cent as the owners claim. But the workers' basic wage is Taka 4,100, which is Taka 1,107 less than the real wage.

What's more, as per TIB's research carried out on 80 factories (situated at Savar, Dhaka, Gazipur and Narayanganj) in the period between May 2018 and April 2019, after the hike, production target has allegedly been increased by 30 to 36 per cent in different factories.

As would have been, the apex garment manufacturers' body BGMEA came down heavily on the TIB as to the correctness of the report, sampling procedure and above all the timing to unveil its findings.

In a statement, BGMEA said that TIB's claim of not adjusting 5 per cent annual automatic increment with the basics of the new wage structure was not true; it also underlined that accumulated impact of 5 per cent automatic annual increments would yield an aggregated 27.63 per cent increment to the basics in all grades over 5 years, whereas the actual increase by the Minimum Wage Board was made at rates ranging from 28.7 per cent to 36.7 per cent.

BGMEA also reportedly sought clarification from TIB about the methodology of its calculation while adding that production efficiency was a continuous process, and as per its knowledge, the Minimum Wage Board did not consider the correlation of the increase in minimum wage and efficiency.

BGMEA thought wages should always be linked to skills and it would strongly recommend wage-skill matrix so that the workers got paid according to their skills, the statement underlined.

It may be mentioned here that the new BGMEA President Dr Rubana Huq in her first interview with *Apparel Online Bangladesh (AOB)* strongly advocated wages based on skill-set.

"Wage has to be set based on skills... And if we are to do that, we would also have to train our workers to think differently. The wage-skill grid must be practised to assess the basic efficiency of the workers, which would translate into a win-win scenario for all," explained Rubana to *AOB*.

The BGMEA's stand on the issue holds water considering the fact that Bangladesh's worker efficiency is only 40 per cent to 45 per cent, whereas the worker efficiency in China, Vietnam and Turkey are 65 per cent, 55 per cent and 70 per cent, respectively.

Taking into account that the industry is already facing challenges on multiple fronts, be it from the competitors, increasing overheads and falling margins, the issue of minimum wage should take a back seat now if the industry has to maintain its competitive edge and move ahead. A hike of more than 50 per cent in wage is quite substantial by any standard after all!



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# Bangladesh top RMG export destination; Tug of war between US and Germany continues



Germany and USA have been the top two export destinations for Bangladesh. But, it always remains uncertain which one stays ahead in terms of apparel shipments coming from the second largest apparel exporter in the world until its financial year ends. The same trend continued in July-February period of Bangladesh's FY 2019 when USA

marginally surpassed Germany with US \$ 4,095.67 million worth of apparel import from Bangladesh, while latter imported US \$ 4,066.97 million worth of apparels.

USA grew 17.69 per cent on Y-o-Y basis, while growth of Germany was restricted to just 10 per cent in first 8-month period of FY 2019. Notably,

in the corresponding period of FY 2018, Germany stayed ahead with US \$ 3,696.69 million apparel import value, while the USA could just import apparels valued at US \$ 3,479.96 million.

As far as Germany is concerned, import of knitted apparels from Bangladesh was way ahead than

that of woven apparels. Knitted apparels shipment to Germany valued at US \$ 2,301.25 million (up by 6.47 per cent), while the shipment of woven apparels stood at US \$ 1,765.22 million, marking 15 per cent growth on the yearly note.

On the other hand, USA saw a complete opposite trend as woven apparel import was more than knitted segment. Against US \$ 1,006.32 million (up by 10.22 per cent) worth of knitted apparels that entered USA from Bangladesh, woven apparel import was almost three times more than knitted and valued at US \$ 3,089.35 million, hitting 20.35 per cent growth on Y-o-Y basis.

The reason for USA staying ahead in the review period was probably the shift of buyers towards countries other than China due to Chinese New Year holidays and Donald Trump's protectionist measures for import coming from China. The opportunity was well grabbed by Bangladesh.

It's worth mentioning here that in the said period, Bangladesh clocked US \$ 23.12 billion in its apparel exports, surging 14.17 per cent on yearly basis.

## Puma Bangladesh launches its biggest flagship store

Puma, one of the renowned sportswear manufacturers in the world, opened its biggest flagship store ever in Bangladesh.

Spread over a large area of 2,220 square feet, the store reportedly marks the first entry of any international brand into the Bangladesh market. The store displays the widest array of the company's advanced performance

and sports style products. While expressing pleasure over the opening of the store, Abhishek Ganguly, Managing Director, Puma India said, "There is nothing more heartening than feeling the excitement around the store launch." He further added that this new store is a great brand statement for Puma in the heart of the capital city of Dhaka. "The response we

are getting is much beyond our expectations. The good thing is that Bangladesh's economy is heading in the right direction and sportswear is increasingly becoming popular. We will continue our focus to expand into the Bangladesh market," added the Managing Director.

Puma made its foray into Bangladesh with the help of its regional partner DBL Group, which

is known for manufacturing and distributing integrated textiles and garments in Bangladesh. "We are incredibly proud to open the first PUMA brand store in Bangladesh at this iconic location. We are looking at expanding our footprints in the region and what a better way than launching our very own flagship store," said M.A. Jabbar, Managing Director, DBL Group.



## B'desh earns US \$ 1.08 billion from apparel exports to US

Bangladesh earned US \$ 1.08 billion from apparel exports to US in the first two months of 2019. This marks a jump of 10.10 per cent year-on-year. The numbers, reportedly, are expected to increase further once 25 per cent import duty is imposed by US on Chinese products. When US President Trump announced about 25 per cent duty on Chinese imported products in 2018, apparels were not a part of it. However, recently, he made it clear that this was applicable for apparel products as well. Once this comes into effect, Bangladesh could become the favourite sourcing destination for several global retailers. "This announcement by US President will now encourage US retailers to consider Bangladesh as an

alternative destination, but a lot will depend on price negotiations with retailers," elaborated Faisal Samad, Senior Vice-President, BGMEA. It is important to note that apparel export from Bangladesh to US has been on rise lately, which is mainly due to the ongoing trade war between US and China. Besides, improved working conditions here in the garment factories have also caught the world attention.

Rick Helfenbein, President and CEO, American Apparel & Footwear Association (AAFA), said that the 25 per cent duty to be imposed could hurt US families and US firms, and thereby US economy too. Therefore, AAFA has urged the President not to impose duty but negotiate further with China.

## Apparel sector seeks additional 5 per cent incentive

Bangladesh's readymade garment industry has urged the Government to provide an additional 5 per cent cash incentive for the next three years in the upcoming budget for 2019-2020 fiscal year.

This was recommended at the recently concluded Dhaka Chamber of Commerce and Industry (DCCI) conclave on 'Sustainability of Ready Made Garments (RMG) Sector in Bangladesh'.

It is worth noting here that the garment exporters are already enjoying 12 per cent cash incentive.

Commerce Minister Tipu Munshi, who was present at the event, agreed that the industry needs

more incentives. The stakeholders, at the event, suggested that reskilling and new skills are essential to enhance the efficiency of the workforce. Besides, they also called for more investment in technology to increase productivity.

Osama Taseer, President, DCCI, said that the sustainability and competitiveness of the RMG sector may get impacted by increase in production cost owing to hike in salary and energy cost as well as declining international market price.

Dr. Rubana Huq, President, Bangladesh Garment Manufacturers and Exporters Association (BGMEA) said that the Government should focus on reducing the cost of doing business for RMG's sustainability.

## Huq-led BGMEA assumes office; assures more transparency

The newly elected office-bearers of Bangladesh Garment Manufacturers and Exporters Association, better known as BGMEA, led by its first women President Dr. Rubana Huq, assumed office for two-year term.

During the 36th Annual General Meeting of BGMEA, at the new headquarters in Uttara (Dhaka), Dr. Huq took over the responsibility from Mohammad Siddiqur Rahman.

After taking charge, Dr. Huq assured that she and all the BGMEA members will work with honesty and integrity to serve all the stakeholders of Bangladesh's



readymade garment industry. She also added that there will be more transparency in the functioning of

responsibilities so as to provide maximum possible service to the stakeholders. Dr. Huq was vocal

about her stand on Accord and Alliance and said that time had come for Bangladesh to enforce its own monitoring mechanisms in the industry. "We will not be accepting any prescription from others; if any initiative wants to stay in Bangladesh, it would have to comply with our terms and conditions," substantiated the new BGMEA President.

She also said the nation wanted to face the fourth industrial revolution challenge and the focus will be now to generate employment through technology adoption.

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# Cambodian Premier meets garment workers on International Labour Day

On the occasion of International Labour Day, the Cambodian Premier Hun Sen met around 3,700 garment workers and closely interacted with them.

The workers belonged to an apparel factory in southern Kandal province.

The Prime Minister not only had solidarity lunch with the workers, but also took out time to dance with many of the garment workers. He even allowed some workers to take selfies with him, much to their delight.

Hun Sen told the workers that while some workers celebrated the day by having solidarity lunch



at their factories, some preferred staying at home and there were some who decided to be part of the rallies to voice their demands. “This is the right that has been carried out in our country,” said

the Prime Minister to substantiate his point.

As Hun Sen said, nearly 2,000 apparel and footwear workers marched at Wat Phnom, Phnom Penh, and urged the Government to provide higher wages and also better working conditions.

This event was organised by the Cambodian Labour Confederation.

Stressing on improving the working conditions, Ath Thorn, President, Cambodian Labor Confederation, said that the association will continue urging the Government to set US \$ 250, instead of the existing US \$ 182, as the minimum monthly wage for garment and footwear workers.

# India to attract more than 300 international brands in the country by 2022

India is increasingly becoming a retail magnet for leading fashion brands across the world. According to McKinsey FashionScope, more than 300 international brands are expected to open stores in the next two years.

Factors like rapidly growing middle-class, increasingly powerful manufacturing sector and strong economic fundamentals have made the country too important for international brands to ignore.



“Economic expansion is happening across Asia, but we expect that 2019 will be the year in which India will take centre stage,” said McKinsey’s report titled ‘The State of Fashion 2019’.

India is predicted to grow at 8 per cent a year between 2018 and 2022. Also, the Indian middle class is forecast to expand at 19.4 per cent a year, outpacing countries like China, Mexico and Brazil.

“As a result, India is set to move from being an increasingly important sourcing hub to being one of the most attractive consumer markets outside the Western world,” maintained the report.

India’s apparel market will be worth US \$ 59.3 billion (about Rs. 4.12 lakh crore) in 2022, making it the sixth-largest in the world and

comparable to Britain with US \$ 65 billion (Rs. 4.51 lakh crore) and Germany with US \$ 63.1 billion (Rs. 4.38 lakh crore), said the data from McKinsey’s FashionScope city-level growth forecasting tool.

Also, the aggregate income of the addressable population is expected to triple between now and 2025.

Given these dynamics, it is little surprise that more than 300 international fashion brands are expected to open stores in India in the next two years.

“Despite structural challenges that include inequality, infrastructure and market fragmentation, we expect strong economic growth; scale and rising tech-savviness will combine to make it the next big global opportunity in fashion and apparel,” it said.



# Australia to focus on enhancing working conditions of Bangladesh garment workers

Australia, together with International Labour Organization (ILO), intends to focus more on enhancing the working conditions of Bangladesh garment workers in addition to promoting women's economic potential.

The joint efforts of ILO and Australia got a boost from the recommitment of funds for Better Work Bangladesh, better known as BWB. This was confirmed in a joint press release recently. Australia has been consistently supporting BWB programme with the intent of bringing in significant changes in the Bangladesh's garment sector.

Elaborating more on the same, Australian High Commissioner to Bangladesh, Julia Niblett, said that Bangladesh's garment sector will be strengthened by the alignment of the country's Government,

unions and employers with the ILO supported Remediation Coordination Cell, the Accord on Fire and Building Safety and the Alliance-supported Nirapon Initiative. While appreciating Australia's efforts to improve the

conditions of garment workers in Bangladesh, Tuomo Poutiainen, Country Director, ILO, expressed pride to be associated with the Government of Australia as both the countries share the common vision of not only uniting multiple

stakeholders but also promoting decent work.

Australia has been supporting BWB since 2016, and the programme reportedly reaches as many as 4,85,708 workers across 210 factories.



# Workers demand better pay and better working conditions on May Day

Several garment and tannery workers demanded an increase in minimum wages and better working conditions on the occasion of May Day. Over 4,000 workers, under the

banner of 'Tannery Workers Union', gathered at Tannery Industrial Estate and demanded to pay them the minimum wage set by the Government. Besides, the workers

also demanded to increase the daily wage to Taka 80 for each temporary worker, in addition to calling for setting up a hospital at the estate, canteen in each factory

and also building houses for the workers.

They said that if they would have houses near the estate, it would also help them save transportation cost. Besides, some workers even complained that factories made them work for 12 hours, which was against the labour law.

The workers voiced in unison that they should be allowed to join the union in accordance with labour law and International Labour Organization. They also demanded for workplace safety, right compensation for workplace accident victims and bringing an end to sexual harassment of women workers.



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## Bangladesh needs to adopt eco-friendly production process, says EU

Bangladesh needs to adopt eco-friendly production process in order to remain the favourite sourcing destination for garment products.

This was stated by Rensje Teerink, EU Ambassador to Bangladesh, during the second edition of the Bangladesh Fashionology Summit at International Convention City Bashundhara, Dhaka.

While stressing on reducing the negative effects on nature, she added that enjoying unilateral market access to EU is sustainability in terms of environment and labour standard. There was also call to introduce technology to further enhance Bangladesh's garment and textile sector.



The apparel manufacturers too assured of being careful about the environment. "We have created products that are biodegradable

and not harmful to the environment," said Syed M. Tanvir, Director, Pacific Jeans Ltd., while substantiating on the same.

Talking about the role Bangladesh's apparel sector has to play in creating environment-friendly production process, Winnie Estrup Petersen, Danish Ambassador to Bangladesh, said that more innovation and research is needed to speed up productivity without compromising on the environment.

She also said that Bangladesh has 7 green factories out of world's top 10, but to remain the global sustainable leader, the country needs to continue with development and innovation.

The event, which focused on latest technology in garment sector and sustainability, was organised by Bangladesh Apparel Exchange (BAE).

## VITAS and WWF continue their endeavour to promote eco-friendly garment industry

The Vietnam Textile and Apparel Association (VITAS) and the World Wildlife Fund (WWF) have

come together yet again to promote eco-friendliness in Vietnam's garment and textile



industry. This was stressed at the meeting for VITAS' Environment Committee that was held in Hanoi recently. Both the organisations had met late last year too, to initiate the project, to help the garment and textile industry go green in Vietnam.

Truong Van Cam, Vice Chairman, VITAS, said that though the garment and textile industry in Vietnam was going through a great phase with export earnings touching US \$ 36 billion in 2018, yet one cannot overlook the fact that the industry is one of the biggest greenhouse gas emitters – not far behind electricity production and agriculture.

The project, initiated by VITAS and WWF, focuses on improving water management and energy sustainability. The three-year project (from 2018 to 2020) aims to transform the country's garment and textile industry into a green industry and thereby bring economic benefits to the country.

Talking about global customers' growing preference for eco-friendly business, Hoang Viet, Sustainable Development Programme Manager, WWF Vietnam, said, "Consumers' shift towards sustainability is now compelling global fashion brands to change their production modes with the objective of meeting high environmental standards."





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# Autopsy of The Stitchless Shirt

When I first predicted a decade back that the future trend of fabric joining will be welding and that the use of needle and thread will become lesser and lesser, least did I expect that I will be asked to conduct a review/autopsy of a stitchless shirt so soon. I had always visualised that the first marketable stitchless shirt would eliminate just the topstitches and the joining would still be done by sewing, but it was a pleasant surprise to see that the shirt has actually become 100% stitchless, topstitches are completely eliminated to give a richer formal look and all joining are by bonding technology. The common visible areas where generally topstitches are done in a traditional sewn shirt like collar, cuff, yoke and shoulder, are characteristically flat and surely give a neat look of a dress shirt. The patch pocket at chest is very impressively attached with 100% matched stripe, and due to absence of topstitch, it gives a look of blazer pockets.

## Technology available

There are primarily two ways by which two or more plies can be joined together without using a needle and thread. First is by fusing two plies together at a very high temperature where fibre content of the fabric is thermoplastic; fusing is done either by ultrasound welding or by hot wedge/air welding. This technique does not use any adhesive in-between two plies and is commonly used for making disposable non-woven bags, now commonly used as replacement of plastic carry bags. Second technique is

the use of adhesive or glue to paste two plies together. While the first technique requires 50% or more of fibre content of the fabric to be thermoplastic, the second technique can join fabric of any fibre content, even 100% cotton. The stitchless shirt by Arrow is 100% cotton fabric, thus glue bonding technology is used to join the parts together.

The traditional bonding technology offered by MACPI, uses a three-step process. In the first step, adhesive tape is applied at the edge of the fabric with backing paper on top. The tape is applied with a bonding machine which looks quite similar to a sewing machine where single layer of fabric is passed through two rollers and tape is attached from a tape dispenser. In the second step, the backing paper is peeled off which is generally done manually by hand just before the third step. Finally, in the third step, the second ply of fabric is placed on the adhesive tape and a regulated temperature and pressure is applied to attach the second ply.

The machine used for the third step may be of three types: first, a simple continuous fusing machine can be used where the seam lines are straight and flat; second, flat bed fusing machine with 3D shaped bucks can be used where seam lines are curved; and lastly, sewing machine like bonding machines with continuously heated top and bottom belts can be used for single or tubular assembling (like sleeve).

Adhesive applying machines are sewing machine lookalikes with table, machine head with roller, different bed types for easy manoeuvring of

*Arrow launched a luxury shirt collection a few years ago – Superluxe – The stitchless shirt. While the traditional method is to join fabric panels via sewing to make a shirt, adhesive material to join fabric components is now being used for making this shirt. The technology is said to eliminate the problem of puckering on the seams of shoulders, side seams and armhole of shirts, something that men in India are becoming increasingly conscious about. There are a number of brands using stitchless concept to manufacture their products, but it's important to talk about the time when this concept was adopted by only a few big names in apparel retail industry, and Arrow was one of them.*  
**Dr. Prabir Jana, Professor from NIFT, Delhi (India)** reviews the product and critically comments about the technology...



the fabric, side fabric trimming device equipped with hot chute or front blower and upturn felling attachment. The sewing machine lookalike bonding machines are used for assembling two plies where adhesive tape is already applied on one of the plies. These machines do not have stitch formation mechanism or feed dog but still have a needle for visual guidance for the operator to help in long panel joining. The needle is generally in 'up' position while the machine is running, but comes 'down' when operator stops the machine for repositioning or pivoting the panels.

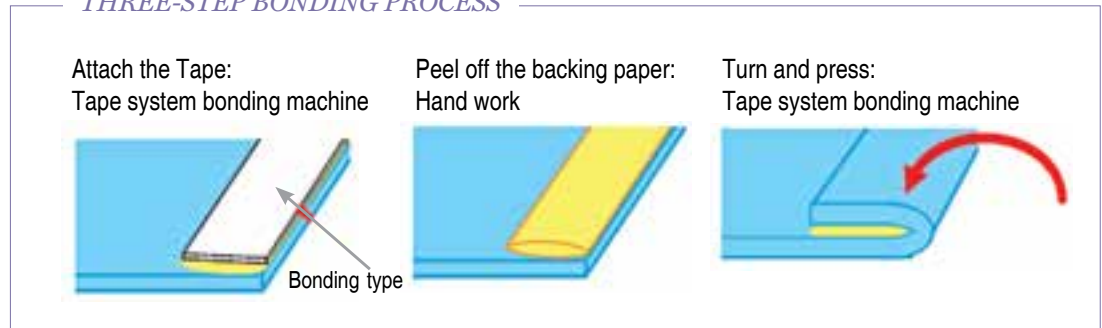
There is another option available for bonding where adhesive laying and temperature and pressure application for bonding happens in one go. The liquid adhesive is dispensed by a specially designed nozzle between two plies of fabric just before the pressure roller. This is comparatively newer and faster technology but requires bonded panels to dry after it comes out of the bonding machine. The Brother BM 1000 offers this technology.

### Construction of the stitchless shirt

Primarily three different seam types are used for the construction of the complete shirt. Collar, cuff runstitch are done by first applying the adhesives followed by seam bonding, using continuous belt fusing machine and after turning inside out and pressing to finish.

Sewing of yoke, armhole, sleeve placket and front placket, requires adhesive tape to be attached first to one ply of fabric component using adhesive applying machine and then

### THREE-STEP BONDING PROCESS



bonding is done in carousel type machine with pre-defined shaped bucks. Second component is placed over the adhesive tape (after manually peeling the backing paper) and temperature and pressure is applied to bond two plies together followed by cooling station to set the joint.

Sewing of side seams are first done by adhesive applying machine followed by feed-off-the-arm bonding machine with continuous heated top and bottom belts. Sewing of bottom hems are done by first applying adhesive followed by automatic edge fold-over machine.

### Critical Analysis

The first look at the folded shirt gives a neat and clean impression of the collar, cuff, front placket and pocket area. While no topstitch is visible, the seam areas are free of either any puckering or untoward impression of adhesive bonding. The brand logo at the inside yoke is perfectly aligned and probably transfer printed. Although adhesive impression is visible on back side of pocket, the pocket attaching is cleverly done to avoid any impression of adhesive on face.

Seam strength of stitchless shirt is also claimed to be higher than an ordinary sewn shirt because during needle penetration, some damage happens to the fabric seam area.

The most prominent product advantage claimed is improved DP (Durable Press) rating of 3.5 to 4.5 for crease resistance, which is just 3.0 in case of a normal sewn shirt.

The armhole appearance from top is flat and pucker-free; however, the impression of glue is visible at places and particularly awkward for stripe or plaid due to criss-crossing of stripes. The backside of armhole seam is specifically unacceptable due to clearly visible raw edges whereas the manufacturer could have better finished the inside of seam. The process followed is that first the armhole edge; is felled edge inside and adhesive tape is applied on the felled edge, the adhesive tape width covers double the felled width. Currently the sleeve is simply placed over the tape; thereby the sleeve raw edge is visible at back. The better method could have been to first 'downward fell' the sleeve edge and then place on top of adhesive tape to give a flat seam appearance. Side seam assembly which also has a similar problem of visible raw edges at the back side of side seam could also have been visibly improved with this technique.

### Technology for the Arrow Stitchless Shirt

Arrow claims that the shirt is being manufactured in China using patented technology and the manufacturer is



The best part is that the buttons have also been tacked on the shirt and since these are titch buttons, no button holes are required; (inset) seam diagram of the placket seam, joined similar to the yoke



The backside of armhole seam is particularly unacceptable due to clearly visible raw edges

mentioned as Luthai Textiles. This listed Chinese company is the owner of over 600 patented innovations in the textile industry globally. The relevant patent search defined the invention as “where the sutureless (meaning stitchless) shirt fabric itself does not contain the binder fibre component, and the main construction process is divided into the cutting process, the wireless (meaning threadless) sewing step and the ironing step.” The fabric is cut into components, in whole or in part conjoined crop; adhesive applied in wireless sewing technique.

The ironing process uses the skeleton bonding technology with shape and/or three-dimensional pressing machine at high temperature followed by cooling to room temperature to obtain the final shirt. While both Luthai and patent literature are tight-lipped about the commercial machinery being used for making the shirt, MACPI claims

to supply the entire technology and machinery to Luthai Textiles, China. Other similar technology available is NoSo heat welding machine from Framis Italia.

The width of the adhesive film varies from 0.2 to 4 cm based on requirements in different seams in the shirt. The front placket uses widest width while bottom hem uses the least width. Welding parameters varies from 100-190°C, pressure from 0.5 to 8.0 kg/cm<sup>2</sup>, and time from 10 seconds to 40 seconds and primarily depends on chemical composition of adhesive, i.e. thermoplastic polyurethane (TPU), polyamide (PA) or polyester (PES).

Patent document of the stitchless shirt proposes two alternative pattern cutting modes for the stitchless shirt. The first, where sleeves front and back are one piece (Figure 1); and second where front and back are one piece (Figure 2). This is definitely an approach towards minimising the joining operations, questioning the fundamental framework of pattern making to fit a human body. Till three-dimensional shaped fabric becomes a reality, this option remains a dream.

### The advantages

The most prominent product advantage claimed is improved DP (Durable Press) rating for crease resistance. DP rating of normal sewn shirt after 20 wash cycles 3.0, while the stitchless shirt after 20 washes shows a DP rating (flatness level) of 3.5 to 4.5. The collar is likely to retain shape better than ordinary ones due to use of special plasticity shaped memory cord interlining.

Seam strength of stitchless shirt is also claimed to be higher than ordinary sewn shirt because during needle penetration, some damage happens to the fabric seam area, therefore resulting in poor fracture resistance in traditional seam. However, no test result was cited to substantiate the claims.

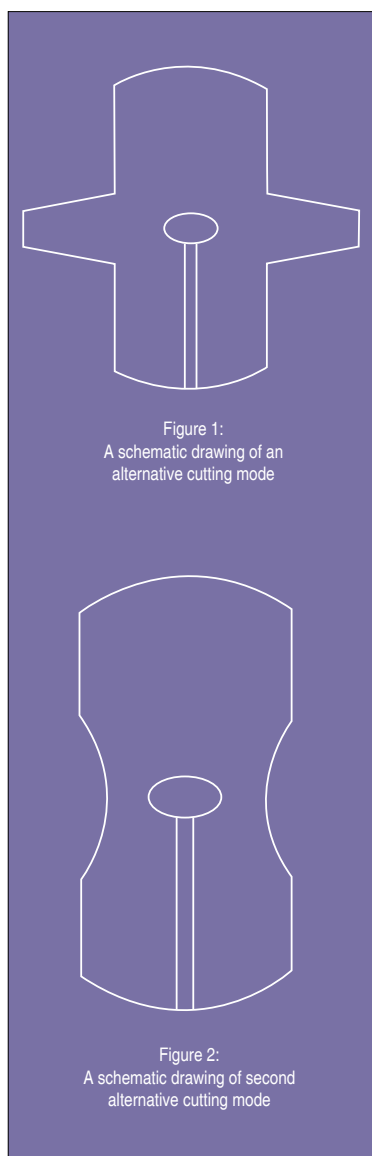
Traditional stitch formation using needle and thread requires fabric to be fed intermittently (and not continuously). However, continuous roller feeding can happen in case of adhesive welding; thus a potential advantage of the stitchless shirt may be higher linear speed of sewing, subject to the operator being able to feed the fabric plies.

### Conclusion

I am sure the future of stitchless garment is going to scale many heights while challenges are nonetheless many. Although 100 washing cycles are being claimed by the manufacturer, the raw edges inside raises serious doubt over the actual washing cycle the shirt can withstand. The patent application also claims cost saving due to uncomplicated processes and saving in consumables like needle and thread. However, from the working processes, it appears the assembling will take double the time (due to two separate processes of applying adhesive and applying temperature and pressure even ignoring backing paper removal time), with additional cost of adhesive and cost of extra energy consumption. If the single step bonding machines (like Brother BM 1000) can also incorporate in-built continuous belt drying, probably production will become faster. Currently, there is no way to give topstitch appearance and this is a serious bottleneck aesthetically; however, I am sure in near future, it will be possible to create different decorative topstitch impressions similar to ultrasonic bonding.

Two questions still remain unanswered: First, what is actually patented; the process or the technology? While the technology is commercially available, it seems the manufacturing process is patented; does it mean any other manufacturer needs to pay royalty to put up similar stitchless manufacturing plant? The inventor's name from patent literature apparently indicates they are employees of Luthai. Does this indicate Luthai and MACPI jointly developed the technology? Second, why Luthai selected three-step bonding technology while more advanced single-step technology is available in the market? Does this indicate that when Luthai invested in this technology, single-step bonding was not available in the market?

Technology will definitely keep evolving in this segment and some exciting future is beckoning us, till then enjoy wearing the stitchless shirt and write back to us after 100 washes!





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# FAT TRUTHS AND UNTRUTHS ABOUT LEAN

***Lean manufacturing is a philosophy that outlines multi-dimensional approaches for reduction of waste. It can be applied in day-to-day operations, strategy, customer satisfaction, manpower training and many other places. Over the years, Lean has been misunderstood, misinterpreted and has misled management in many ways. As a result of this, certain myths have emerged about Lean.***

Going by the Wikipedia definition, 'Lean' is a production practice that targets elimination of waste that does not create value for the end customer. Lean is the set of 'tools' like Value Stream Mapping, 5S, *Kanban* (pull systems), and Poka-Yoke that assist in the identification and steady elimination of waste (*muda*). The second approach to Lean Manufacturing (which although lacks popularity), is promoted by Toyota, in which the focus is upon improving the 'flow' or smoothness of work, thereby steadily eliminating *mura* ('unevenness') through the system and not upon 'waste reduction' *per se*. Typical practice in garment industry is to follow one or more of the above tools to implement Lean. Techniques to smoothen the flow include production levelling, 'pull' production (by means of *Kanban*) and the *Heijunka box*. Even though there are loads of books and websites defining each tool and technique in detail, this article will try to demystify the perceptions about Lean applications.

**Value stream mapping, 5S, 7W are popular Lean approach(s)**

**RIGHT**

Consultants always resort to those practices that are easier

to implement, require negligible cost and most importantly where existing standard is comparatively low so that showing improvement is easier and quicker. Garment manufacturing factories are generally very disorganised and people tend to cover their backside by keeping buffer. Therefore, it is relatively easy for consultants to plan, organise (by following 5S process) and/or eliminate/reduce buffer (both material and time) by following 7W approach. Value stream mapping maps the VA, NVA, NNVA activities and due to a very low percentage of VA (generally less than 3%) prevailing in the industry, it makes the favourite choice of Lean implementation.

***Kanban and Poka-Yoke are less popular Lean approach(s)***

**RIGHT**

Kanban is one of the most promising yet less popular (underutilised) approaches to Lean due to poor understanding of logic amongst both manufacturers and consultants. Although some manufacturers unknowingly use Kanban (or some improvised version) system for managing accessories inventory without realising that they already



Lean is the set of 'tools' like Value Stream Mapping, 5S, *Kanban* (pull systems), and Poka-Yoke that assist in the identification and steady elimination of waste (*muda*). The second approach to Lean Manufacturing (which although lacks popularity), is promoted by Toyota, in which the focus is upon improving the 'flow' or smoothness of work, thereby steadily eliminating *mura* ('unevenness') through the system and not upon 'waste reduction' *per se*.

are practicing Lean. Kanban can be potentially helpful in maintaining inventory between cutting & sewing, between different operators in sewing line, and sewing & finishing department; however, rarely anyone attempts the same. Wherever there is a problem of transparency and non-accountability of pieces, one should try to implement Kanban approach to limit the stock. Poka-Yoke requires innovative 'out of the box' thinking and therefore lacks effort from both manufacturers and consultants.

***Inventory reduction in one echelon implies Lean implementation in supply chain***

**WRONG**

Reduction of inventory in supply chain is like an enigma. The supply chain encompasses all departments in an organisation and also that of the suppliers and customers of the organisation. Lean supply chain means reduction of total inventory in the chain, and not merely shifting inventory from one organisation to another. As the common Lean implementation approach is reducing inventory department-wise or organisation-wise, there lies the risk of pushing inventory from

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one department to another, or from one organisation to another instead of actually reducing inventory. For example, while attempting to reduce inventory (WIP) in sewing line, very often the cut parts inventory in cutting room increases. Similarly, while a retailer attempts to reduce inventory, invariably the finished goods inventory increases at manufacturers' or wholesalers' end. One should be cautious as the apparel supply chain is downstream dominated; (i.e., a downstream player like retailer is always the dominating partner in relation to manufacturer) very often the inventory is pushed upstream.

### **Lean implementation complements quick response retailing**

#### **WRONG**

One needs to understand that scale and scope generally does not go together. Quick response works on reduced time to react. Inventory is replacement to information about, if we have the correct information about what will sell, then we need not maintain inventory. At any given level of information clarity, quick response will require more inventory to be maintained as there is lesser time to react. Technically any company dealing in commodity merchandise can attempt to make the supply chain Lean. In contrary, any company following quick response business model ideally should not wish to be Lean at least in inventory stocking, as the business model requires the company to maintain inventory. That does not mean a quick response company can't become Lean; the company can implement and practise tools of Lean other than inventory reduction.

### **Lean implementation complements fast fashion**

#### **WRONG**

Fast fashion is changing of style faster in the store. To change old style faster with new style (and that too with uncertainty), one needs to maintain considerable amount of

stock in the supply chain, whereas a commodity product is replenished at slower pace (and with better certainty), meaning if information is available, thereby the supply network upstream can be planned in advance. As certainty of information is better, inventory requirement is lower. Lower inventory means Lean organisation.

### **Kanban implementation in sewing line means Lean approach**

#### **RIGHT**

There are several ways through which Lean can be implemented in the sewing line. An organisation which is working in PBU system in sewing line may decide to follow pull system by implementing Kanban, where upper limit of WIP that can be created between any two sewing operations be set and adhered to. In this system, the last operator controls the flow of material, thus called 'pull' system. If any succeeding operator slows down, then WIP consumed at slower pace will reach Kanban limit and will slow down the preceding operator eventually. Any organisation implementing Kanban from PBU system can be attributed to Lean implementation.

### **Lean implementation in sewing mandates single-piece flow**

#### **WRONG**

Single-piece flow in sewing means Lean implementation, but the reverse is not true, as Lean implementation does not necessarily require single piece flow. There are other ways of implementing Lean in sewing line. Single-piece flow means there is zero work in process (WIP) between any two operators in sewing line. This is an extreme form of teamwork, popularly known as Toyota Sewing System (TSS), when pieces move from hand-to-hand in a stand up work format and are never kept in bin/trolley. In PBU system, WIP is maximum to ensure continuity, but in TSS, number of operators are less than number of sewing machines

*One needs to understand that scale and scope generally does not go together. Quick response works on reduced time to react. Inventory is replacement to information, if we have the correct information about what will sell, then we need not maintain inventory. At any given level of information clarity, quick response will require more inventory to be maintained as there is lesser time to react.*

and multi-skill operators work as self-balanced team in hands-off or bump-back system where succeeding members take the WIP from preceding operators. The objective of Lean is reduction of WIP, therefore Lean implementation may lead to 'single-piece flow' but this is not necessarily mandatory.

### **Reducing inventory across the production line guarantees reduction of manufacturing lead time**

#### **WRONG**

Lean considers inventory as one of the seven wastes (7Ws) that needs to be reduced. However, reduction of inventory below a standard value across critical points on the production line could increase the lead time.

Inventory is rather a buffer against variability. The more the variability, the more is the inventory that is required to address it. For example, apparel manufacturing starts with cutting and ends with finishing. Cutting follows a batch production system and sewing is usually a single-piece flow. Inventory (WIP-cut panels worth one day stock) is kept between cutting and sewing as safety stock for breakdowns and feeding issues experienced in cutting and supply chain respectively. Lack of WIP could starve sewing of panels just in case cutting experiences manufacturing variability.

Management decides to keep standard WIP in critical areas across the production lines to address internal variation. While one could say that reduction in inventory reduces manufacturing lead time, it does not guarantee lead time reduction, because it could lead to starving in system, in turn, leading to capacity losses.

### **5S (Workplace organisation) will always improve production**

#### **WRONG**

Workplace organisation definitely assures 'place for everything and



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Production numbers improve if we can identify the capacity constraint (bottleneck) and improve the flow through the bottleneck. While 5S may reduce the searching time, it does not always improve production numbers unless we remove the bottleneck across the production lines.

everything in its place'. However, the hypothesis that 5S can always improve production numbers is debatable.

Improving production number requires consistency in the application of:

- Workplace Organisation
- Waste Elimination
- Process Standardisation
- Continuous Improvement

Production numbers improve if we can identify the capacity constraint (bottleneck) and improve the flow through the bottleneck. While 5S may reduce the searching time, it does not always improve production numbers unless we remove the bottleneck across the production lines.

### Lean makes you work harder

#### WRONG

This is the most common perception about Lean. One fundamental and strong pillar of Lean is 'Just in Time'. An inextricable element of JIT is Takt Time planning.

Takt Time matches the pace of production to the pace of sales. Logically speaking, Takt Time establishes the production rhythm. Imagine that you are an operator on the production floor, desperately trying to recover production numbers towards the end of the shift. Mistakes are bound to happen with a faster than possible rate of production. Moreover, overburden caused to the operator results in defects and excess inventory creation.

Lean establishes a pacing mechanism throughout the factory. Adopting a standard pace across the factory makes people work smarter and not harder.

### Single-piece flow can only improve quality and reduce manufacturing lead time always

#### WRONG

To achieve a continuous flow, the ultimate goal recommended by Lean is a single-piece flow. However, single-piece flow may or may not always improve quality and lead time.

Take the example of a shirt production line. We observe that batch production is usually followed in parts production. The reason being that single-piece flow could actually increase one's non-value add time. Cycle time on workstation consists of:

- Value add time (stitch time – change in the fit, form and function of the product)
- Non-value add time (something that process does not need at all)
- Essential non-value add time (steps that do not add value, but are required currently).

Most experts point out that single-piece flow in parts assembly increases the ENVA (for example, the time it takes to pick the part from the UPS conveyor to stick and place it back on the conveyor, may take more time than the stitch time). Therefore, in such a case, batch production is faster than the single-piece flow.

Quality can be improved using both batch production and single-piece

*Lean production not only successfully challenged the accepted mass production practices in the automotive industry, significantly shifting the trade-off between productivity and quality, but it also led to a rethinking of a wide range of manufacturing and service operations beyond the high-volume repetitive manufacturing environment.*

flow, usually when labour-intensive work is involved. The output largely depends on the operator's skills, and as long as skills are upgraded and consistent, the quality also remains reliable as well.

### Lean is a destination

#### WRONG

Lean is more of a transformational journey in itself, rather than being a destination. Most companies deploy Lean tools and techniques for a period of 18-24 months. Sometimes, quality and production improve only by applying these techniques, but one observes that unless a strong culture is established, the improved results soon wither away.

Lean can only be sustained by reinforcing the following elements on a daily basis:

- Visual Factory (Detecting abnormalities visually)
- Daily Accountability (Culture of having meeting at the right time and right place with the right people)
- Standard work executed at all organisational levels
- Institutionalisation of a Continuous Improvement (Kaizen) Culture

### Conclusion

Lean production not only successfully challenged the accepted mass production practices in the automotive industry, significantly shifting the trade-off between productivity and quality, but it also led to a rethinking of a wide range of manufacturing and service operations beyond the high-volume repetitive manufacturing environment. Most importantly, we need to understand why we need Lean... Is it to reduce inventory? To better organise things? To checkmate mistakes? What is our priority? Instead of starting to think about Lean, we should start thinking about the objective first which will help us identify the correct Lean tool. As waste is eliminated gradually, quality improves while production time and cost are reduced.



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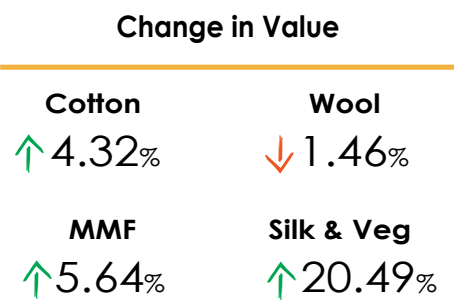
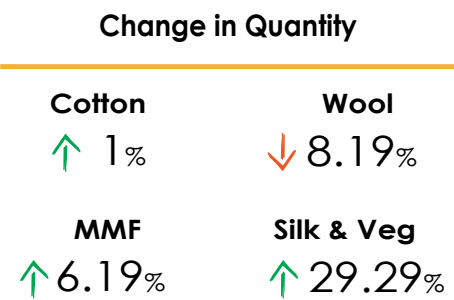
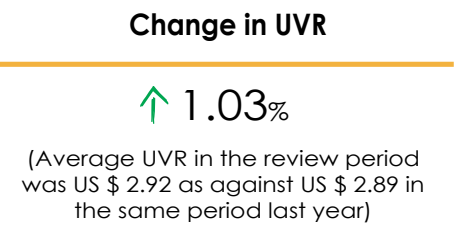
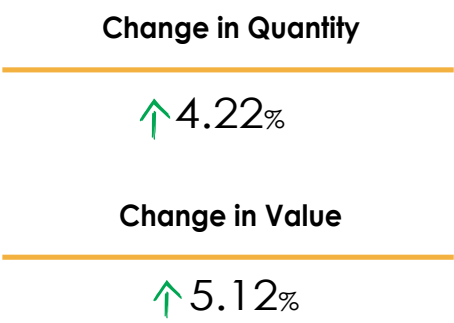
**Vardhman Textiles Limited (Head Office),** Chandigarh Road, Ludhiana, Punjab - 141010, India, E: mngt@vardhman.com

Chinese shipments to USA grow, but at slower pace;  
other Asian countries take benefit

January to February 2019

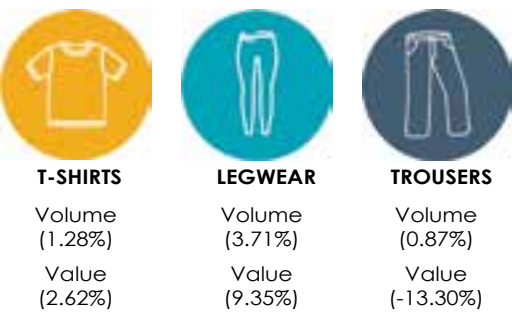
There were chances that USA will levy import taxes from January onwards that could make apparel shipments expensive. This possible tax regime coupled with Chinese New Year holidays made buyers shift their base from China which benefited India, Bangladesh and Vietnam as indicated by the figures, and kept China's growth restricted. Another aspect that emerged after analysing the data is India's rise as compared to Indonesia. It's worth mentioning here that India currently holds 5th rank in apparel exporting destinations tally to USA, while Indonesia stands at 4th spot with US \$ 800 million export value. The gap between the export values of these countries was US \$ 108 million in Jan.-Feb. '18 period which compressed to just US \$ 46 million in the same period of 2019. It is expected that India will surpass Indonesia in another 4 to 5 months and dethrone it to grab 4th spot in tally.

Global Apparel Imports by the US:  
January to February 2019



[The information has been extracted from US custom site and further analysed.]

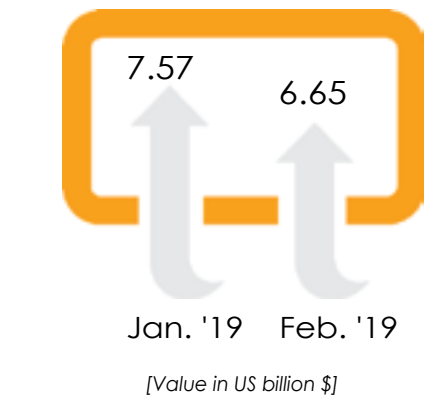
Percentage change in top 3 product categories imported by USA



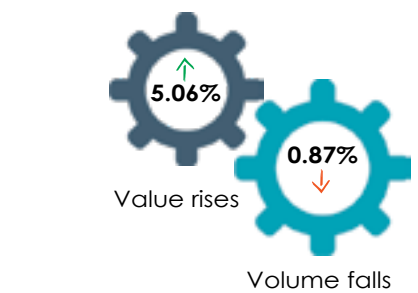
UVR change in apparel imported by USA (3-year comparison)



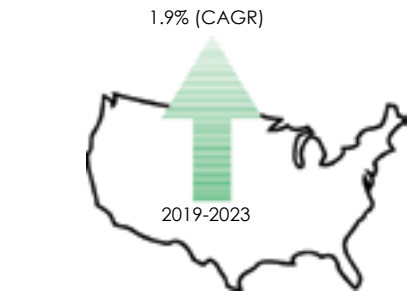
Month-wise USA apparel import trend



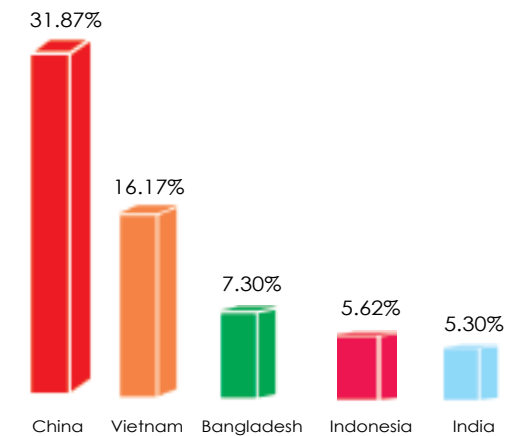
Percentage change in Bangladesh's top product category export (Trousers) to USA



Forecast: The US apparel market is expected to grow annually by 1.9% (CAGR) in 2019-2023 period.



Value-wise share to USA by top 5 apparel exporters





Total global apparel imports by the US: Jan.-Feb. 2019

(Qty in mn SME & Value in US mn \$)

Type of Apparel	Jan.-Feb. 2018		Jan.-Feb. 2019		% Change	
	Qty	Value	Qty	Value	Qty	Value
Cotton	2009.26	6598.82	2029.38	6883.97	1.00	4.32
Wool	17.59	320.55	16.15	315.88	-8.19	-1.46
MMF	2588.03	6339.73	2748.35	6697.16	6.19	5.64
Silk & Veg	63.39	266.82	81.96	321.51	29.29	20.49
Total	4678.27	13525.92	4875.83	14218.52	4.22	5.12

Total apparel exports to the US by 7 major manufacturing destinations: Jan.-Feb. 2019

(Qty in mn SME & Value in US mn \$)

Countries	Jan.-Feb. 2018		Jan.-Feb. 2019		% Change	
	Qty	Value	Qty	Value	Qty	Value
India	196.41	694.75	209.90	753.85	6.87	8.51
Bangladesh	355.01	935.97	375.98	1038.56	5.91	10.96
China	1918.35	4395.57	2012.57	4532.57	4.91	3.12
Pakistan	88.84	221.70	93.31	238.02	5.03	7.36
Sri Lanka	72.48	322.84	76.81	342.58	5.97	6.11
Vietnam	663.36	2066.71	736.38	2299.63	11.01	11.27
Indonesia	221.85	802.81	218.66	800.30	-1.44	-0.31



Item-wise quantity increase/decrease in apparel imports by the US: Jan.-Feb. 2019

(Qty in doz, legwear in dpr, babieswear in kg)

APPAREL TYPE	Total Imports by USA									Exports to USA								
				China			India			Bangladesh			Vietnam			Indonesia		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
Babieswear	20,903,346	19,860,508	-4.99	10,049,415	9,051,647	-9.93	1,637,993	2,030,968	23.99	1,875,042	1,922,528	2.53	1,781,886	2,045,588	14.80	759,570	480,135	-36.79
Foundation Garments	10,353,756	11,300,693	9.15	5,847,253	6,325,314	8.18	218,334	250,320	14.65	819,591	1,026,867	25.29	840,764	832,343	-1.00	718,373	899,816	25.26
Jackets & Blazers	5,397,141	6,230,041	15.43	2,692,215	2,876,762	6.85	83,959	96,338	14.74	332,414	462,992	39.28	1,051,486	1,370,755	30.36	262,529	288,197	9.78
Ladies Blouses	10,741,793	10,231,952	-4.75	4,568,088	4,199,503	-8.07	1,389,579	1,484,989	6.87	362,926	395,027	8.85	1,924,625	1,897,513	-1.41	1,401,008	1,297,079	-7.42
Ladies Dresses	12,448,211	12,186,890	-2.10	5,703,115	5,866,713	2.87	982,745	974,436	-0.85	326,619	259,383	-20.59	2,633,758	2,547,321	-3.28	854,836	869,909	1.76
Ladies Skirts	2,863,671	2,946,864	2.91	1,321,721	1,326,973	0.40	114,785	140,281	22.21	191,806	198,146	3.31	636,610	607,386	-4.59	188,110	162,462	-13.63
Legwear	62,721,516	65,048,411	3.71	43,356,910	47,712,732	10.05	1,457,469	1,044,143	-28.36	0	0	0	799,314	1,155,483	44.56	124,483	81,139	-34.82
Men's Shirts	7,298,686	7,247,857	-0.70	1,471,705	1,370,013	-6.91	681,570	603,444	-11.46	1,982,278	2,211,611	11.57	973,806	904,869	-7.08	572,712	593,364	3.61
Nightwear	8,768,599	8,806,420	0.43	5,215,509	5,488,944	5.24	431,768	475,823	10.20	474,772	414,837	-12.62	906,807	952,953	5.09	124,759	131,562	5.45
Suits / Ensembles	2,200,520	2,367,515	7.59	1,087,201	1,288,044	18.47	104,257	124,836	19.74	15,502	24,695	59.30	425,623	428,401	0.65	140,213	106,405	-24.11
Sweaters	1,037,027	1,431,059	38.00	777,179	1,088,600	40.07	6,280	7,994	27.29	45,761	87,936	92.16	22,303	52,935	137.34	7,281	5,064	-30.45
Trousers	56,766,748	57,263,251	0.87	17,344,448	17,078,898	-1.53	1,087,564	1,230,583	13.15	9,502,888	9,419,877	-0.87	9,219,499	10,319,730	11.93	3,776,875	3,387,292	-10.31
T-Shirts	95,760,599	96,981,855	1.28	17,633,260	17,873,075	1.36	4,631,606	4,865,754	5.06	4,164,718	4,200,514	0.86	14,546,976	14,927,662	2.62	4,905,856	4,603,325	-6.17
Undergarments	40,741,133	43,315,883	6.32	9,735,415	10,113,453	3.88	2,828,738	3,142,781	11.10	4,457,696	4,663,777	4.62	7,087,371	8,580,528	21.07	396,857	406,657	2.47

Item-wise value increase/decrease in apparel imports by the US: Jan.-Feb. 2019

(Value in US mn \$)

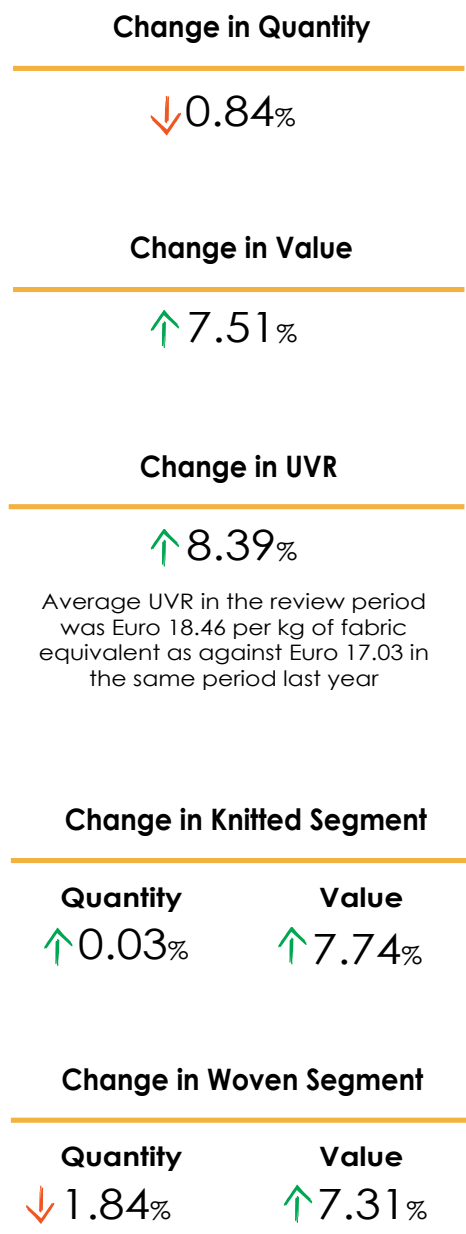
APPAREL TYPE	Total Imports by USA									Exports to USA								
				China			India			Bangladesh			Vietnam			Indonesia		
	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change	2018	2019	% Change
Babieswear	429.24	422.76	-1.51	190.22	171.80	-9.68	37.76	48.64	28.81	35.02	38.52	10.00	37.82	46.58	23.16	22.52	15.15	-32.71
Foundation Garments	428.77	458.86	7.02	173.67	201.81	16.20	15.80	16.25	2.84	16.57	24.24	46.29	56.79	53.52	-5.77	32.98	36.41	10.41
Jackets & Blazers	798.67	913.29	14.35	331.35	350.25	5.70	13.08	13.67	4.50	39.83	51.47	29.22	175.95	215.81	22.65	41.36	46.48	12.38
Ladies Blouses	704.17	674.97	-4.15	266.09	250.53	-5.85	109.66	114.18	4.12	19.94	24.32	21.97	100.14	97.79	-2.35	96.57	93.10	-3.60
Ladies Dresses	995.10	972.78	-2.24	435.59	427.50	-1.86	89.44	92.71	3.66	12.60	8.98	-28.72	170.79	172.69	1.11	70.24	72.51	3.23
Ladies Skirts	163.67	174.80	6.80	67.57	69.02	2.14	8.40	10.23	21.84	7.28	8.98	23.25	33.10	32.60	-1.51	10.66	9.13	-14.38
Legwear	308.35	337.17	9.35	188.23	223.76	18.88	4.15	4.58	10.31	0	0	0	3.26	4.96	52.41	0.52	0.40	-23.11
Men's Shirts	574.45	585.73	1.96	127.35	110.52	-13.22	46.45	43.25	-6.89	104.76	121.34	15.83	75.92	75.35	-0.76	48.19	51.97	7.84
Nightwear	333.27	361.88	8.59	192.40	206.11	7.13	16.07	21.20	31.94	11.94	13.25	10.92	36.06	41.52	15.14	6.26	8.49	35.69
Suits / Ensembles	226.47	236.74	4.54	56.80	63.08	11.05	16.15	15.45	-4.30	2.28	1.93	-15.53	36.65	38.54	5.16	16.60	15.91	-4.14
Sweaters	115.78	133.71	15.49	78.19	91.55	17.09	0.57	0.61	6.79	2.68	5.50	104.84	1.94	2.70	38.68	0.59	0.58	-2.71
Trousers	3,306.69	2,866.94	-13.30	830.81	698.54	-15.92	76.01	77.78	2.33	477.59	501.75	5.06	551.25	453.98	-17.64	197.86	143.91	-27.27
T-Shirts	3,436.78	3,526.79	2.62	725.44	698.26	-3.75	181.286	192.845	6.38	106.81	114.33	7.04	567.47	609.93	7.48	198.16	190.57	-3.83
Undergarments	588.78	644.49	9.46	145.62	170.55	17.12	51.82	53.92	4.06	46.83	50.29	7.39	92.68	106.96	15.40	7.44	9.96	33.88

EU apparel import goes down in volume terms

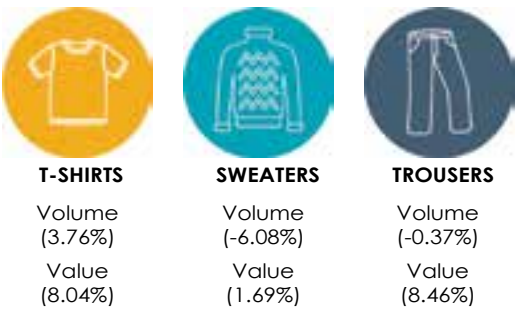
January to March 2019

European Union fell in its volume-wise apparel import in the first-quarter of 2019. The suppressed quantities were a result of high unit prices that restricted the buyers from placing more orders in countries like China, India, Vietnam and Cambodia. However, Bangladesh was exception during the review period and the country marked growth both in values and volumes despite the rise in unit prices. On the other hand Turkey, one of the leading exporters of apparel to EU, was the only country in top 5 destinations tally which saw NO rise in the unit prices. The fall in orders can be attributed to factors like low consumer spending in Europe; stagnant market growth; and global economic slowdown due to instable political scenario.

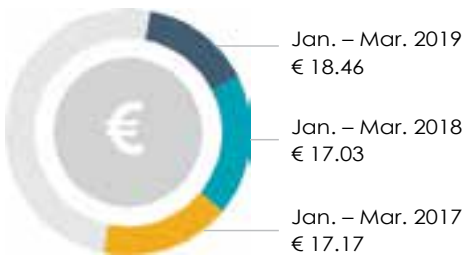
Global apparel imports by the European Union: January to March 2019



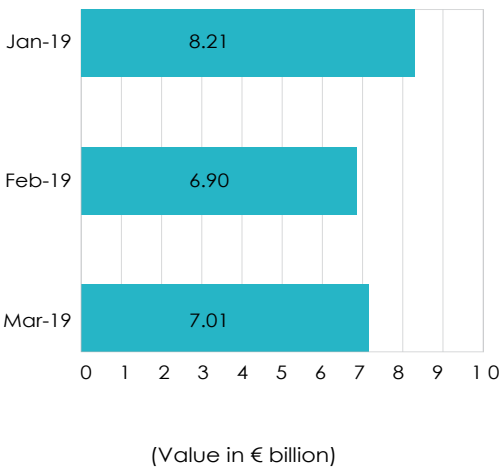
Percentage change in top 3 product categories imported by EU



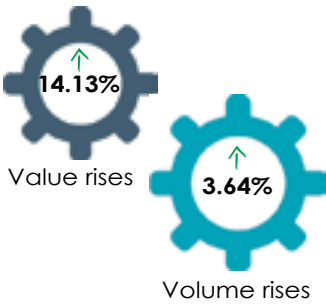
UVR change in apparel imported by EU



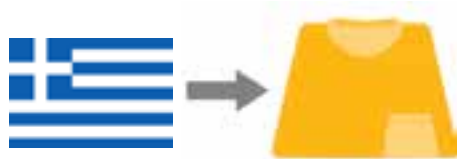
Month-wise EU apparel import trend



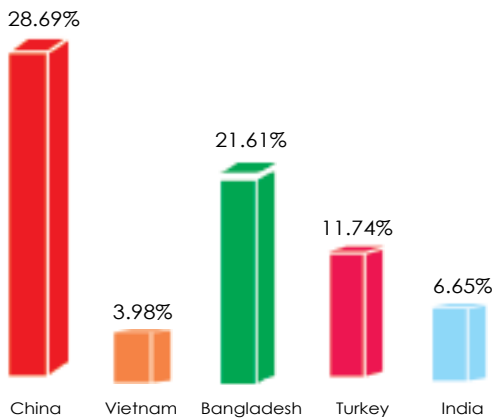
Percentage change in Bangladesh's top product category (Trousers) to EU



Fact: Average spending per capita per annum on apparels in Greece is € 300



Value-wise share to EU by top exporters

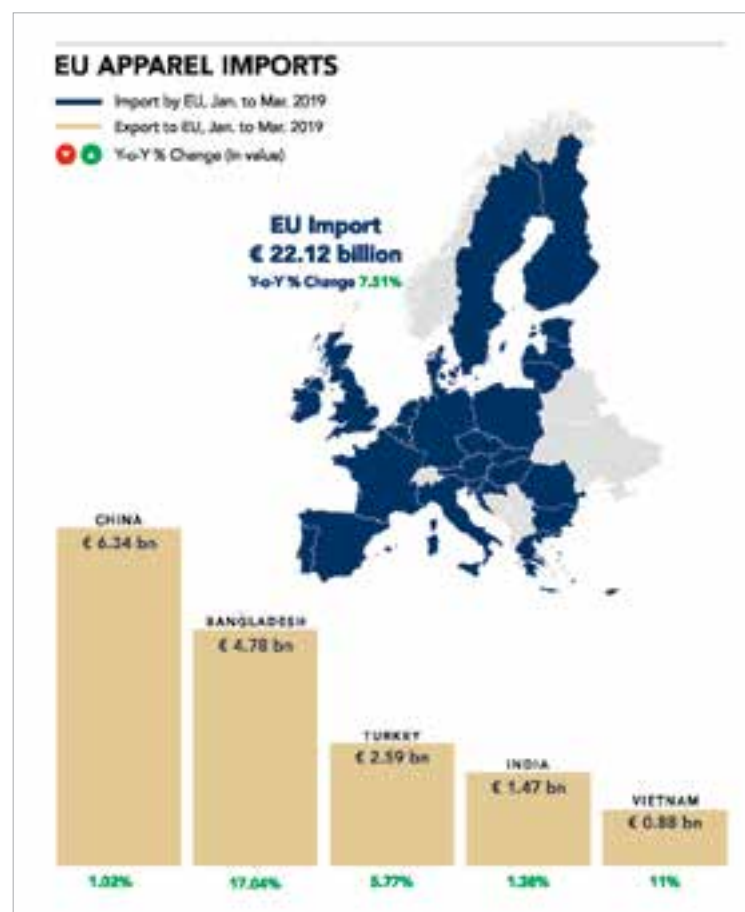


[The information has been extracted from EU custom site and further analysed.]



## Apparel imports of the EU: Selected Countries (Qty in mn Kg & Value in mn Euro)

Country/ Category	Jan.-Mar. 2018		Jan.-Mar. 2019		% change	
	Qty	Value	Qty	Value	Qty	Value
<b>WORLD</b>						
Knitted	648.44	9745.76	648.65	10500.28	0.03	7.74
Woven	559.76	10827.78	549.45	11618.83	-1.84	7.31
Total	1208.20	20573.54	1198.10	22119.10	-0.84	7.51
<b>CHINA</b>						
Knitted	196.66	2796.51	176.63	2819.68	-10.19	0.83
Woven	199.27	3486.15	180.15	3527.32	-9.60	1.18
Total	395.94	6282.66	356.78	6347.01	-9.89	1.02
<b>INDIA</b>						
Knitted	43.01	703.58	42.32	719.06	-1.61	2.20
Woven	29.27	748.88	28.12	753.50	-3.90	0.62
Total	72.28	1452.47	70.44	1472.57	-2.54	1.38
<b>BANGLADESH</b>						
Knitted	190.74	2209.97	204.82	2609.97	7.38	18.10
Woven	128.52	1874.72	135.69	2170.71	5.58	15.79
Total	319.26	4084.69	340.51	4780.68	6.66	17.04
<b>SRI LANKA</b>						
Knitted	11.11	223.38	11.40	245.58	2.63	9.94
Woven	6.92	165.15	7.11	187.71	2.78	13.66
Total	18.03	388.53	18.52	433.29	2.68	11.52
<b>PAKISTAN</b>						
Knitted	29.60	300.04	31.20	339.89	5.38	13.28
Woven	30.28	401.65	33.38	450.91	10.22	12.27
Total	59.89	701.69	64.57	790.81	7.83	12.70
<b>VIETNAM</b>						
Knitted	12.35	253.86	13.18	305.94	6.79	20.51
Woven	31.86	539.67	21.86	574.82	-31.40	6.51
Total	44.21	793.53	35.04	880.76	-20.74	10.99
<b>TURKEY</b>						
Knitted	67.88	1387.18	70.92	1454.81	4.47	4.88
Woven	37.98	1068.51	40.98	1142.69	7.92	6.94
Total	105.86	2455.69	111.90	2597.50	5.71	5.77



## Item-wise quantity increase/decrease in apparel imports by EU: Jan.-Mar. 2019 (Qty in mn Kg)

APPAREL TYPE	Total Imports by EU			Exports to EU											
				China			India			Bangladesh			Vietnam		
	2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change
Babieswear	30.53	30.29	-0.79	9.49	8.41	-11.42	5.12	5.52	7.81	9.10	9.29	2.04	0.30	0.27	-9.13
Foundation Garments	14.78	15.08	2.01	8.53	7.96	-6.66	0.09	0.10	6.88	1.86	2.10	12.69	0.71	0.78	9.60
Jackets & Blazers	6.82	6.45	-5.48	3.56	2.84	-20.09	0.14	0.08	-39.04	0.66	0.82	23.02	0.20	0.18	-9.85
Ladies Blouses	33.93	30.43	-10.30	9.57	7.99	-16.49	7.00	5.54	-20.94	5.44	5.33	-2.03	1.40	1.25	-10.45
Ladies Dresses	52.63	56.69	7.72	20.10	18.96	-5.69	6.94	7.80	12.34	7.22	8.42	16.66	1.18	1.21	2.65
Ladies Skirts	12.51	16.13	28.98	4.41	5.48	24.23	1.04	1.05	0.87	2.47	3.53	42.78	0.30	0.38	27.33
Legwear	50.37	51.58	2.40	24.66	26.23	6.37	0.58	0.49	-16.26	0.31	0.18	-40.94	0.48	0.67	39.99
Men's Shirts	75.06	76.74	2.25	11.43	10.17	-10.97	6.96	6.93	-0.56	32.97	34.99	6.11	2.87	2.91	1.49
Nightwear	23.30	21.35	-8.38	6.59	5.27	-20.12	6.39	6.18	-3.32	5.21	5.55	6.63	0.36	0.29	-18.92
Suits / Ensembles	11.30	10.66	-5.71	6.26	5.73	-8.43	0.57	0.56	-1.40	0.76	0.85	13.07	0.12	0.12	0.58
Sweaters	115.54	108.51	-6.08	37.42	29.83	-20.29	3.01	3.09	2.89	33.44	32.93	-1.54	1.85	2.12	14.53
Trousers	320.53	319.35	-0.37	76.44	65.07	-14.87	10.62	10.60	-0.14	106.98	110.87	3.64	9.92	9.26	-6.59
T-Shirts	169.60	175.99	3.76	19.86	18.21	-8.32	14.91	14.27	-4.28	83.00	92.10	10.95	2.25	2.39	6.30
Undergarments	31.97	32.51	1.70	15.26	14.50	-4.98	1.85	1.75	-5.54	6.00	6.72	12.17	0.73	0.73	-0.56

## Item-wise value increase/decrease in apparel imports by EU: Jan.-Mar. 2019 (Value in mn Euro)

APPAREL TYPE	Total Imports by EU			Exports to EU											
				China			India			Bangladesh			Vietnam		
	2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change	2018	2019	% change
Babieswear	608.67	635.41	4.39	190.61	181.62	-4.71	112.20	124.28	10.77	156.03	171.13	9.68	6.59	6.23	-5.45
Foundation Garments	498.22	542.36	8.86	228.77	227.59	-0.52	4.67	4.50	-3.63	56.25	69.95	24.35	33.05	41.53	25.68
Jackets & Blazers	130.22	129.82	-0.31	60.29	49.95	-17.16	2.91	2.09	-28.23	8.43	11.92	41.32	4.76	4.81	1.02
Ladies Blouses	973.76	947.62	-2.68	263.66	251.72	-4.53	208.30	177.61	-14.73	111.93	117.07	4.60	29.41	33.53	14.00
Ladies Dresses	1314.16	1529.76	16.41	497.58	548.19	10.17	188.56	214.44	13.73	98.88	133.79	35.30	24.34	29.54	21.36
Ladies Skirts	266.44	356.83	33.92	89.36	117.94	31.97	25.75	28.89	12.23	35.26	54.19	53.70	6.21	8.59	38.25
Legwear	486.77	518.14	6.45	185.73	216.35	16.48	6.31	5.67	-10.26	3.49	1.83	-47.54	4.17	5.54	32.94
Men's Shirts	1433.42	1590.01	10.92	234.07	236.85	1.19	155.88	162.54	4.28	452.39	532.22	17.65	67.88	77.11	13.61
Nightwear	261.60	273.99	4.73	63.61	64.20	0.93	68.16	70.98	4.14	55.57	66.27	19.24	2.10	2.13	1.52
Suits / Ensembles	192.68	195.76	1.60	70.77	80.72	14.06	11.90	11.09	-6.77	9.37	11.18	19.29	1.78	3.20	79.08
Sweaters	1967.15	2000.31	1.69	717.15	648.03	-9.64	54.23	56.72	4.58	431.58	471.17	9.17	36.74	46.26	25.93
Trousers	4921.37	5337.62	8.46	947.36	972.68	2.67	178.18	189.20	6.19	1340.21	1529.59	14.13	191.64	203.02	5.94
T-Shirts	2476.65	2675.75	8.04	329.00	332.78	1.15	248.51	244.72	-1.52	867.51	1056.25	21.76	43.30	55.71	28.66
Undergarments	551.67	613.49	11.21	211.91	221.92	4.72	30.52	30.99	1.56	101.30	121.30	19.74	21.02	23.99	14.13

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Canada Apparel Imports

January to February 2019

India’s dismal apparel export performance continues; falls 2.10% to Canada in February

Continuing the trend, Chinese New Year holidays have impacted its global apparel exports in February 2019 and Canada was not an exception. China’s growth was hampered due to the factory closures and exports to Canada were down by (-) 4.92 per cent in February, while India too plunged by (-) 2.10 per cent in the review period. The shift was directly absorbed by Bangladesh, Vietnam and Cambodia which grew significantly by 7.84 per cent, 16.62 per cent and 13.40 per cent, respectively.

Canada Imports in Value	B'Desh Exports in Value
↑8.85%	↑27.80%
The knitted apparel reported 9.69% surge during the review period, whereas the woven segment saw rise of 8.03% in value terms.	Bangladesh registered growth in knitted garment exports to Canada by 30.34%, while woven garment exports too surged by 26.22% during the review period.

Japan Apparel Imports

January to March 2019

Japan picks up its apparel import sluggishly in first quarter of 2019

During the first 3-month period of 2019, Japan experienced slight surge in its apparel import. It is interesting to note that despite Japan witnessing a rise in its unit prices of apparel import, the countries such as India, Bangladesh and Vietnam saw a decline in unit prices of their respective export. The fall in prices somehow boosted the orders placed by Japanese buyers in these countries. China, on the other hand, remained stagnant in its prices but still fell down on exports, probably because of the Chinese New Year holidays.

B'Desh Exports in Value	Vietnam Exports in Value
↑22.68%	↑9.07%
Bangladesh grew massively in both knitted and woven segments. Overall, the country escalated by 24.11% in volumes and 22.68% in values.	Vietnam grew by 9.07% in values of its exports to Japan, while volumes increased by 14.10% on Y-o-Y basis.

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# *An Ode to the Modern Bride*

## SPRING 2020 BRIDALWEAR TRENDS

Bridalwear is one of the most decorated, flourishing and constantly growing segments, as the consumer is ready to go all out on wedding attires as the garment's intrinsic value to the wearer supersedes that of other segments. The trend of having a small, yet ostentatious wedding is marking a major change in the consumer behaviour, as buyers are now more open to spending on the smaller details such as the 'perfect wedding dress' rather than going for a big wedding. The success of the bridalwear market is supported by the recent study done by statista.com, which values the global market of wedding dresses at US \$ 32.5 billion (2017), and has forecasted it to reach about US \$ 43.5 billion by 2022.

The bridalwear market is evolving with the changing consumer psyche as the conventional wedding dresses that were once right out of a fairy tale are now giving way to wedding outfits that champion functionality and the ease of the bride; styles such as pantsuits and blazer dresses which were a fresh new addition to the mix for Spring 2020. Major couture and design houses are catching up with the minimal bride trend rapidly, whether in the form of silhouettes, fabrics or the overall ensemble itself, while cleverly balancing the simplicity with glamourising value addition details.

This segment was once synonymous with high fashion and couture, but the market is now ripe with opportunities for retailers and mass brands as retail bigwigs are now investing in the segment in a bullish way. ASOS was one of the first to enter the mass market bridal segment, and as per Edited.com, it increased its bridal offering by 10.5 per cent in Q1 of 2017 as compared to Q1 of 2016. The prices are about 340 per cent over the average price across dress category, as the average price for ASOS bridal is US \$ 196.25. Yet, the pieces are still affordable as compared to the designer bridalwear counterparts, which explains their impressive 55 per cent sell-out. Later on, Topshop was quick to join the shift as it launched Topshop Bride in April 2017 along with the UK-based mass retailer Whistles. H&M thought a step ahead and along with wedding dresses, it started cashing in on the trending category of wedding lingerie.

Keeping up with the on-the-go, quick and modest weddings, the runways swept aside the conventional bridalwear trends to give way to a fresher take on the wedding gown. Here's your edit for the bridalwear trends for Spring 2020...





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info@neozipper.com

Bangladesh Regional Office  
Chittagong:  
Nasirabad View, 4th Floor  
Holding # 1298/1459, 2 no. gate, Mosque Lane  
Jaman Road, East Nasirabad, Chittagong-4000  
Bangladesh  
Tel : +88 031 2552775, Fax: +88 031 2552779  
info@neozipper.com

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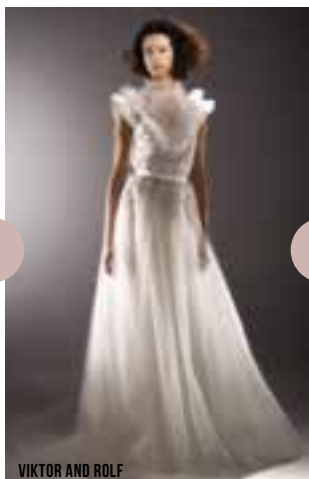
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## Tulle Big & Small

Tulle has always been synonymous with grandiose wedding dresses and ball-gown silhouettes, but this season saw the basic tulle manipulated in multiple ways to produce details that were either intricately minimal and detailed or evidently extravagant.

The most common exposition of the trend were small and narrow pleated tulle belts placed over hems of different tiers throughout the length of the gown, or gracing the necklines where tulle choker necks ended in the seams of the front yokes of the dresses. Long strips of pleated tulle were also gathered and placed together all over the skirts to give an overall voluminous silhouette. Gathered tulle applique with motifs ranging from small florals placed all over the dresses to large bunched up gathers on the shoulders, waistlines or creating multiple tiers throughout the wedding gowns were other additions.



NAEEM KHAN

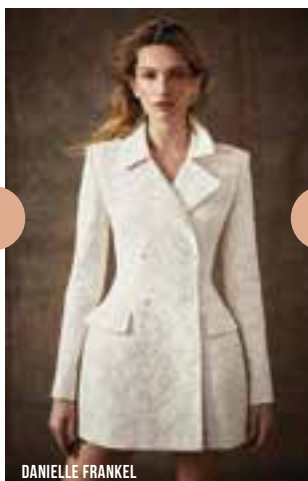


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## Bride in Business

The unconventional suiting and blazer trend found its way to seep into the bridalwear segment as well, after majorly storming the Haute Couture and Prêt-à-porter runways. The modernised take on the conventional gowns led designers to introduce value addition materials such as embroidered, lace and heavy satins in the form of pantsuits, blazers with skirts and shorts, jumpsuits and the very in-trend blazer dresses for the bride that means business.

Certain elements were kept intact to keep the wedding cheer alive, as some of these ensembles included trains added to the blazers and pants, or coats worn over short and flouncy dresses, along with the traditional veils and headbands.



DANIELLE FRANKEL



REEM ACRA



CUSHNIE





VIKTOR AND ROLF



DANIELLE FRANKEL



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AMSALE



MIRA ZWILLINGER

## ● *Minidress Mania*

The Spring 2020 season for this segment saw a trend of receding lengths as mini dresses were included in several collections to cater to the needs of the brides who want to ease into the wedding reception without changing their ceremony attires. Flouncy ballerinas, contoured short dresses, belted blazer dresses and simple A-line dresses were the most recurring out of the lot.

The bodice of these dresses was kept extravagant to match the minimal skirts, with gathered fabrics around the neckline, floral applique patches, large bows and knots on the waistlines, embellished corsets and ostentatious sleeves. Heavy trains and headgears were another value addition to the short length dresses.

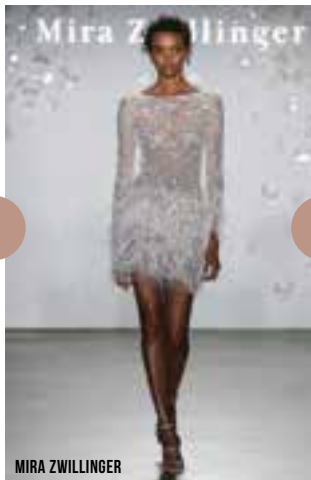
## ● *Feathered Away*

The feather weather rained on the bridalwear runways as well, as designers opted for the detail that was a megatrend of the Fall 2019 runways in various ways. Mira Zwillinger and Naeem Khan kept it short and furry, as the former celebrated the confluence of sequins with feather detailing over sheer fabrics while the latter took inspiration from carnival celebrations with a boxy, multi-tiered all-over feathered dress paired with mesh stockings and feathered boots.

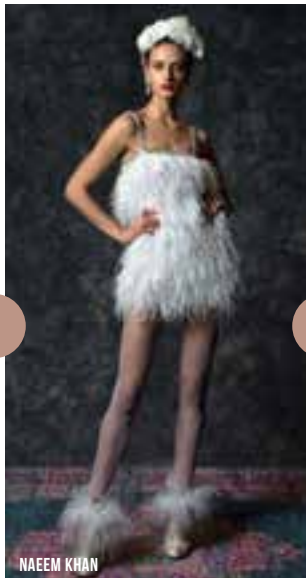
Oscar De La Renta embraced its signatory style of effortless couture with long combed feather attached to a gathered waist and waterfall hem overall feathered dress, while Zuhair Murad added feather detailing to the dropped necklines and ball gown helms, or embellished with sequins over half-body capes.



ZUHAIR MURAD



MIRA ZWILLINGER



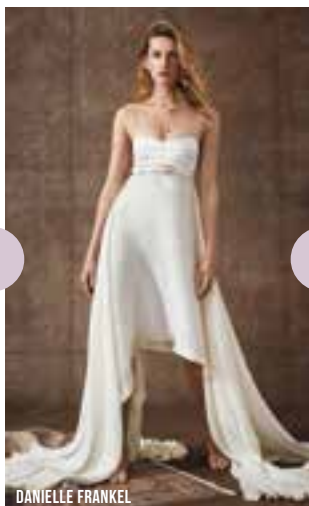
NAEEM KHAN



OSCAR DE LA RENTA



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DANIELLE FRANKEL



GALIA LAHAV



ZUHAIR MURAD



MIRA ZWILLINGER

## A Side of Volume

The gowns might have minimal silhouettes that were closer to the body, but this simplicity was balanced by an added touch of flounce and volume on the sides of the wedding dresses. Placed at the level of the belts, or the waistline of the gown, gathered tulle, waterfall satin and lace layers were attached on the sides, leaving the front space open for easy mobility.

The most common trait of this trend were sheer fabrics added to detailed and heavily embroidered contoured dresses, just to raise the silhouette and fall of the ensemble from drab to glam, without stealing the attention away from the actual craftsmanship put into the main garment.



ZUHAIR MURAD



ANNE BARGE



MARCHESA



TEMPERLEY LONDON

## Vanishing Veils

Veils have their own charm, but as the trends for bridal fashion are steering away from the conventional elements, veils also saw a downfall from the previous seasons, giving way to headgears, headbands and even capes in a big way.

Designers opted for over the top headgears and headbands, with earthy, bohemian touches that included forest-themed details and floral attachments, with white roses as the top choice. Chunky embellished headbands also took centre stage, especially after the 'Markle effect' that created ripples in the bridalwear industry. Capes were also adorned with these dresses to elevate the skin-hugging silhouettes in place of the veils, in ditsy laces, heavy sequins or in a structured way with exaggerated collars.



## Sheer Affair

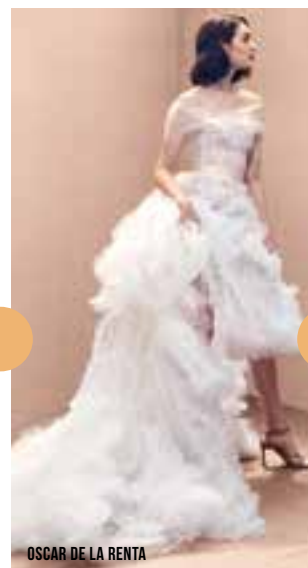
The bold bride is here, and so is the season that has put sheer wedding dresses on the trends radar. Bejewelled body suits and body hugging sheer dresses were the go-to for many designers as Oscar De La Renta appliqued floral embellishments over sheer or lace fabrics with netted finishing, while Zuhair Murad wove sheer dreams in embroidered fabric corsetted dress with an exaggerated veil in similar finish. Reem Acra and Mira Zwillinger presented a couture take on the trend with heavily embellished, bejewelled skin-toned sheer gowns with scarf veils and metallic embroidery straight gowns with pearl embellishments. Designers included conservatism with sheer limited to sleeves in the case of Danielle Frankel and mock-neck styles by Temperley.



## High-Low

The high-low hemlines trend is seeing a full circle as 2020 marks the end of a decade; the trend first rose to immense popularity in 2011. Designers, this year, employed asymmetric hems in short and long skirt lengths, majorly ending in a waterfall hemline with decorated tie-up waists, bows and knots.

Monique Lhuillier presented tulle extravaganza with ball-gown silhouette wedding dresses and shaggy high-low hems, while Oscar De La Renta contrasted a heavily pleated voluminous skirt with long train and gathered front with a draped minimal bodice. Alon Livne, Valentini Spose accompanied Victor and Rolf, as they went for more basic styles with pleated and architecturally draped gowns ending in bows and petal panels, whereas Mira Zwillinger got leggy with her cropped length mididresses for the trend.



## SWEATING IN STYLE

# YOGA APPAREL TAKING THE WORLD BY STORM

The global yoga apparel market is expected to post an incremental growth of over US \$ 3.4 billion during 2019-2023. Rising popularity of yoga in most parts of the world owing to the growing awareness among people towards fitness and wellness is a major factor that is fuelling the growth of the market. In recent years, yoga, the ancient form of workout and meditation that originated in India, has gained a significant popularity globally, especially in North America. With expanding study on this field, yoga is being received equally well by housewives as well as by different businesses.

The global yoga apparel market is highly fragmented, though major growth is coming from Western markets with the presence of multiple competitors. Key market competitors of this domain are today emphasising more on business expansion to make their presence felt in developing regions which are still less explored for this segment. Hectic work schedules and increasing health issues have been compelling people to opt for different sports activities as a form of exercise. In line with growing popularity, the manufacturing of innovative yoga apparel is also catching up like a fire worldwide. With the help of technology and enhanced features, the global yoga apparel market is expected

to mask a notable CAGR of 11.3 per cent during the projected period. Various end-users of yoga apparel use the products for different types of workouts and prefer technologically advanced products.

“The booming travel and tourism industry will significantly contribute to the growth and expansion of the global yoga apparel market. Use of improved raw materials in yoga apparel has become one of the major distinguishing factors among key competitors. The key competitors must comply with strict environmental regulations in various countries for the supply of raw materials,” said Sharan J, a Lead Retail Goods and Services Research Analyst from Technavio.

## STRETCHING UP

The journey of yoga apparel started long back in 1970s, when people used to wear leotards, unitards or yogatards, which are still marketed by Marie Wright Yogawear. But the problem with these apparels was that you really couldn't go to the bathroom without peeling the whole thing off! And then the era of yoga capri was born. The first pair of yoga pants came in for women to wear at the studio and Lululemon sold it in 1998. They were a mix of nylon and lycra-synthetic elastic fibres that provided the stretch and softness needed to manage all those sweat-inducing contortions during a lengthy session on the mat. The pants filled a niche for yogis, who were simply looking for a higher-end alternative to plain cotton leggings.

Lululemon's original fabric, Luon, with a high proportion of nylon microfibre as opposed to a more typical polyester blend, was trademarked in the US in 2005. Many of its newer fabrics are branded and geared toward specific uses. Luxtreme is a moisture-wicking, four-way stretch fabric that's meant to fit like a second skin. Nulux is a compression fabric meant for sweatier workouts. Silverescent is sold as Lululemon's stink-conquering technology, using silver bonded to the surface of fibres to stop bacteria from reproducing. A T-shirt made from the material costs US \$ 68.

**Lululemon's original fabric, Luon**, with a high proportion of nylon microfibre as opposed to a more typical polyester blend, was trademarked in the US in 2005. Many of its newer fabrics are branded and geared toward specific uses.





**Yoga pants** have similarly managed to **dive denim deep** into an existential crisis, threatening **Levi Strauss & Co.** so deeply that it had to scramble to adapt.

Two decades later, they've conquered the closet, even for people who never stepped inside a yoga studio. In 2014, teenagers began to prefer leggings over jeans. Then people started wearing athletic clothing (or athleisure, but it's mostly just yoga pants) to run errands. Now they're wearing yoga pants to the office. The US imports of women's elastic knit pants last year surpassed those of jeans for the first-time ever, according to the US Census Bureau.

## THREAT TO DENIMS?

Fashion trends change constantly, but rarely does an entire category shift. Over four decades, rubber-soled sneakers gave way to basketball shoes, which in turn fell to trainers. Boxer briefs didn't exist 25 years ago; drawers were still filled with plain old briefs. But now the hybrid is America's most popular men's underwear. Yoga pants have similarly managed to dive denim deep into an existential crisis, threatening Levi Strauss & Co. so deeply that it had to scramble to adapt. The company

added stretch and contouring to its jeans, while now hoping to retain some of its rugged essence.

The popularity of yoga pants has, predictably, led to a flood of competitors as brands fill every market segment, from Old Navy's US \$ 20 pants to Lucas Hugh's US \$ 230 versions. Lululemon Athletica, which is largely credited for bringing stretchy pants to the masses, has poured money into developing new fabrics to fend off rivals – a pack that now includes the world's biggest athletics companies.

What was once a simple stretchy legging, it seems, has now become an engineering marvel. Not too surprising, though, when you realise that about US \$ 48 billion is being spent on activewear in the US every year. The biggest businesses now in the athleticwear space have invested heavily in growing their womenswear lines, especially for developing new fabrics and features for the once-simple yoga pant. Active bottoms and leggings currently is a US \$ one billion industry, according to NPJ Group Analyst Marshal Cohen.

Where Lululemon found success with female consumers by providing a niche product that could satisfy casual and active uses, major brands such as Adidas and Nike completed the picture, confirming just how strong the athleisure trend could be. According to data from retail research firm *Edited*, there are more than 11,000 kinds of yoga-specific pants available these days with retailers worldwide across both men's and women's apparel.

The leading companies that are catering to this market are Lululemon; Lucy; Elektriz; Champion; Noli Yoga; 90 Degree; easyoga; Sunyoga; Nike; Adidas; American Apparel; Forever 21; Gap; Under Armour; Beyond Yoga; Onzie; teeki; Merrithew; prAna; TriMax Sports and YogaDirect. Similarly, the US and India hold a major share in the yoga market and the other countries that are following suit are Canada, Singapore, Australia. Factors such as the manufacturing of innovative yoga apparel with respect to technology and features and growing number of yoga practitioners will provide considerable growth opportunities to yoga apparel manufacturers in future.

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# Banana Republic implements Oracle cloud solution to modernise merchandising process

Banana Republic, has implemented Oracle Retail, combining Oracle Retail Merchandising Cloud Service and Oracle Retail Integration Cloud Service to synchronise its merchandising operations from buying to inventory valuation.

This solution will assist the brand with daily tasks such as managing purchase orders and sales auditing by creating an interface that delivers expectations and alerts for attention-requiring items. The ultimate goal will lie on providing the brand with a single view of inventory, product data and transaction detail.

“To meet the evolving needs of our global customers and how they want to shop, we need to simplify and scale operations. By adopting the service, we



can maintain a consistent and modern merchandising platform that drives greater productivity through automated best practices,”

said Sally Gilligan, CIO, Gap Inc. Moreover, Gap is also actively adopting Oracle software suite to drive operation agility and assist

with better intelligence. The most recent implementation has been at INTERMIX. Also, it is further looking to synchronise its back-end and front-end functions with the help of Oracle cloud infrastructure and by leveraging other Oracle technologies, including Oracle Exadata Cloud Service and Java Cloud Service.

The implementation of Oracle solution is a step towards broadening the digital enhancement of in-store operations at Gap brands. The retailers have also deployed a solution that consolidates and personalises the communications sent from headquarters to more than 3,000 company-owned stores and implements mobile shift swapping across all brands.

# La Chapelle witnesses decline in sales; closes down over 1,800 outlets

The Hong Kong-based fashion retailer La Chapelle witnessed its sales dip by a worrying 21 per cent in Q1 of 2019 to record US \$ 352 million.

2018 had seen the retailer shut down as many as 1,877 outlets owing to poor sales and inefficiency. The number of closed stores now stands at 9,540 (till the end of March 2019).

With one of its every five directly operated stores shutting down, the retailer is going through a worst phase. The net earnings ascribed to shareholders too fell by 94.4 per cent to clock US \$ 1.4 million.

La Chapelle added that the poor Q1 was mainly due to negligible

increase in apparel expenditure on a continual basis and also the fast receding confidence of the shoppers.

Reportedly, the sales of apparels, shoes and hats in the mainland China region increased by paltry 3.3 per cent year-on-year which is actually 5 percentage points less than the growth rate of all consumer goods sales.

Besides, in 2019, the Chinese New Year holidays were 11 days earlier compared to what it was in 2018, which also significantly impacted the sales of winter items in Q1 of 2019.

Also in Q1, the earnings of ladies' apparel brands like La Chapelle,



Puella, 7 Modifier and La Babite saw a Y-o-Y slump of 26.6 per cent,

29.7 per cent, 22.9 per cent and 23 per cent, respectively.



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PATENT



Anshuman Dash  
Akesk Kumar  
Sriram Rengarajan

+91 99010 88911  
+91 98714 80747  
+91 93425 88914

anshuman@hh.com.hk  
akesh@sakhogroup.com  
sriram@hh.com.hk

Gururaja Seshagiri  
Gianluca  
Cahit Tas

+91 98867 76303  
+39 33512 05544  
+90 53372 48690

guru@martingroup.it  
gianluca@martingroup.it  
cahittas@martingroup.it

**H&H ASIA GROUP LTD:** Room 1117, 11/F, Asia Trade Centre, 79 Lei Muk Road, Kwai Chung, N.T., Hong Kong,  
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**Groz-Beckert Singapore Pte. Ltd.**

159 Kampong Ampat #05-03A/04, KA Place, 368328 Singapore  
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Email: manikc111@gmail.com, info@eastmanbd.com  
Contact Person: Manik Chowdhury +88-01713241755, manik@eastmanbd.com

**Chittagong Branch:**

304, SK Mujib Road, Mir Mahub Mansion,  
Dewan Hat, Chittagong, BANGLADESH  
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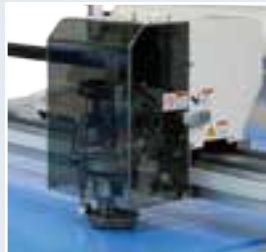


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Mr. Syed Hafeez - +91-9845539295  
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+880 1713005964, +880 1755604013

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